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AIMS

EURAS Journal of Social Sciences (EJOSS) is a peer-reviewed international scientific open access periodical published in accordance with independent, unbiased, and double-blind peer-review principles. It publishes two issues per year. The publication language of the journal is English. The journal is an official publication of the Eurasian Universities Union (EURAS). EJOSS aims to contribute to the literature by publishing manuscripts of highest scientific level in such fields as social sciences, Sociology, Social Anthropology, Economics (Political Economy and Public Economics), Political Science, International Relations, Contemporary History.

SCOPE

EJOSS welcomes experimental outputs as well as interpretative proposals in all the fields of (broadly intended) social sciences. The journal conforms to the Principles of Transparency and Best Practice in Scholarly Publishing (doaj.org/bestpractice).

From the Editor-in-Chief

Dear readers,

I am proud to introduce this second number of the EURAS Journal of Social Sciences. I think we have accomplished our mission of providing high quality contributions on uncommon topics which deserve attention and analysis. The nationality of the authors and the set of the countries subject of the articles is noticeable as well. We present six articles plus a valuable shorter contribution concerning e-learning during covid-19 pandemic and a very interesting book review. We hope you enjoy this issue and feel encouraged to follow and support the activities of EURAS. Again and forever, many thanks to the staff of EURAS and Istanbul Aydın University and to all the people who have cooperated to this accomplishment.

Prof. Fabio L. Grassi, PhD

EURASIAN UNIVERSITIES UNION - POWERFUL COLLABORATION THROUGH A UNIQUELY WIDE NETWORK

EURAS launched in 2008, is a non-profit international association, covering universities and other higher education institutions within the Eurasian region to promote cooperation among 120+ universities from all across the West and Central Europe, Balkans, Caucasus, Middle East as well as the whole of Asia and working for the global advancement of educational standards in the Eurasian region.

Being the cradle of all known civilizations and having 2/3 of all the world population, the Eurasian region thus represents a center of excellence in terms of educational developments and cultural flows. By building an international educational platform for regional universities, EURAS serves its members as a gateway to reach the best educational services worldwide. As per the aim of internationalization via a dynamic and communicative network, EURAS has been strongly working on a wide range of fields in order to reach the highest achievements globally.

EURAS, as one of the fastest-growing higher education associations connects universities and all the higher education institutions belonging to different geopolitical and cultural backgrounds and seeks ways to enhance their dialogue and exchange of best practices.

Eurasian Universities Union's mission summarized as follows:

- ✓ Building a platform for regional universities to reach international educational services.
- ✓ Encouraging student and academic staff mobility.
- ✓ Establishing cooperation and networking among members.
- ✓ Improving academic standards of education.
- ✓ Promoting policy development internationally.
- ✓ Representing the interests and concerns of member universities by supporting their prestige and visibility worldwide.
- ✓ Strengthening the leadership of Eurasian universities by sharing knowledge and exchanging best practices.
- ✓ Supporting innovation.

EURAS creates a wide and productive ground for mutual sharing in various academic, social and cultural areas. Each step taken for a certain end will also bring its own gateway to many other aspects and contribute to the enrichment of the activities of the members and the union. EURAS mainly target is at the following projects and services;

- ✓ Awards and scholarships.
- ✓ Certificate programs for EURAS Members.
- ✓ Database portal and Members guide.
- ✓ EURIE-Eurasia Higher Education Summit-Annual Conference of EURAS.
- ✓ Interactive platforms such as blog page and other common areas for intercommunication.
- ✓ Joint research and development activities.
- ✓ Joint projects under EU, UN and national agencies programs.
- ✓ Online events, webinars, workshops.
- ✓ Periodical and academic publications.
- ✓ Ranking systems.
- ✓ Short term programs, Summer schools, and internships.
- ✓ Student and academic exchange programs.
- ✓ Thematic conferences, seminars, and meetings.

- ✓ Volunteer programs.

EURAS has 3 academic journals;

- ✓ EURAS Journal of Social Sciences – EJOSS.
- ✓ Eurasian Journal of Health – EJOH.
- ✓ EURAS Journal of Engineering and Applied Sciences – EJEAS

Eurasian Universities Union's vision is to promote sustainable peace and advanced technology worldwide through cultural developments and new educational systems. EURAS' vision for the future is to contribute to the society consisted of self-aware and highly qualified individuals benefiting from global education and mobility services. EURAS aims to open the borders of education to the public and to favor the exchange of knowledge and best practices among higher education institutions from the entire Eurasian region.

In order to accomplish these goals, we believe that connecting the universities from diverse identities can carry out the distinction in guaranteeing real equality and accessibility to excellence in educational standards.

Analysis of First and Second Level Agenda Setting in Selected West African Newspapers' Early Coverage of COVID-19

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ABSTRACT

This study investigated the agenda setting functions of the West African media in the early response coverage of COVID-19 and the extent of connection between the agenda setting roles and the reportage of the novel virus. Anchored on agenda setting theory, the study employed quantitative content, explication textual and collocation analyses to analyse 944

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COVID-19-related media content (news, editorials and features) from selected newspapers (with online presence) in the five Anglophone West-African countries (Nigeria, Ghana, Liberia, Sierra Leone and the Gambia). Findings show that out of the five newspapers, Nigeria's and Ghana's created public attention to COVID-19 pandemic in form of education, information (news), guiding and opinion moulding (features and editorials), particularly immediately cases were recorded in the two countries. The study established that having the same health crisis does not translate to having a significant and same level of media response in the early stage of the crisis in West Africa.

Keywords: *COVID-19, Media Reportage-Agenda Setting, Early Response-West Africa, Health Crisis Communication*

INTRODUCTION

On February 14, 2020, Africa recorded her first case of Covid-19 when Egypt became the first country to report such in the region. Coming down to the Anglophone Africa countries, Nigeria had her first case on February 27, 2020 (Ihekweazu & Agogo, 2020) followed by Ghana, Liberia, the Gambia, and Sierra Leone which recorded their first cases on March 12, March 16, March 17, and March 30, 2020 respectively (BBC, 2020a; BBC 2020b; Medical Xpress, 2020; Plafker, 2020 & WHO, 2020).

Later, many of these countries started issuing measures and guidelines to defeat the virus. Most of their measures were in tandem with most guidelines issued by the World Health Organisation (WHO). According to WHO (2020) and Sawlani (2020), these measures included prohibition of mass gathering/social distancing, lockdowns/travel restrictions, the use of face

masks, and hand sanitisers. During the early outbreak of Covid-19 in English-speaking West Africa countries, evidence shows that their health institutions enlightened and informed their citizens in form of advocacy and sensitization about the virus, though some performed the functions early while some tarried.

Exploring the Nigeria Centre for Disease Control (NCDC)'s website for example reveals that the centre had informed Nigerians earlier before the first case was recorded in Nigeria. The first advocacy was published on January 22, 2020 with the title 'Public Health Advisory to Nigerians on Novel Coronavirus.' The second report was published on January 30 with 'What You Need to Know About The Novel Coronavirus.' NCDC went further with another update on January 31 2020 [Public Health Advisory to Nigerians on Novel Coronavirus (#2)]. February 2 had 'Surveillance Case Definitions for New Coronavirus Disease (Version 1)' and 'Public Health Advisory to Nigerians on Novel Coronavirus (#3).' When the first case was recorded on 27 February, NCDC reported it on 28: First Case of Coronavirus Disease Confirmed in Nigeria. On the next day (February 29), it added 'Frequently Asked Questions on Coronavirus' and 'Public Health Advisory to Nigerians on Novel Coronavirus (#4).' Since that first case, NCDC kept on briefing Nigerians about its measures in curtailing the new virus.

In addition, a visit to Ghana Health Service's website indicates that the first awareness about the new Coronavirus was reported on March 4. It captured WHO's DG's remarks on Covid-19. The next awareness was on 7 and 15 March. On 17 March, 'Updates on Coronavirus Disease 2019 (Covid-19) in Ghana' was reported on the website. On 18 March, a report on self-quarantine was updated. The awareness centred on Covid-19 rising to 9 in Ghana. Graphical reports (situation reports) started in May, precisely May 22.

In the Gambia however, the Ministry of Health's website contains downloadable situational reports, but they were in conjunction with WHO. Despite that the first situation report was published on 24 March, it dated 21 March. For Sierra Leone, it was established that the first awareness creation dated March 18 while the president addressed his people on 19, 17 and 31 March. On April 1, the Sierra Leone's health website, mohs.gov.sl, also reported the first case. More reports came on April 2, April 26 and 27. In Liberia's moh.gov.lr, there were 18 downloadable situation reports, though the first volume was dated March 16 while the 18th volume dated April 2. The above content mapping clearly shows how prompt or otherwise the health institutions of the five selected Anglophone West-African nations were in the early outbreak of the pandemic.

This section will be hanging if the basic roles the mass media perform during pandemic are not chipped in. In health crisis situations, the media set an agenda on or/and frame issues. In performing these responsibilities, they become an intermediary between the government and the people by informing and enlightening citizens as well as encouraging them to take positive actions (Shalvee & Sanbhav, 2020). However, Gever and Ezeah (2020) argue that the Nigeria media developed very little interest in Coronavirus-related stories when it had not reached the country. The pattern of reportage later increased for Covid-19 stories when Nigeria recorded her first case. This is an indication that proximity and impact influence the kind of agenda any media outfit sets.

Therefore, this study seeks to establish the forms of roles (agenda setting) the English-speaking West African newspapers played at the early stage of COVID-19 pandemic. It also examines the relationship among media agenda setting, rise in COVID-19 cases and public-policy agendas.

LITERATURE REVIEW

Media in Africa, like their counterparts in other continents, have passed through different developmental phases. From the time when the mass audience relied solely on print media for information to their dependence on radio and TV broadcasts for media contents, the media landscape in many African countries has shifted to digital formats (online). The emerging technologies, through which media consumers rely heavily on their telecommunication gadgets for on-the-move and accessible information, are facilitating and influencing the increase in this media shift (Southwood, 2016). The growing population of young ones and the increasing level of internet connectivity are also contributing to this new media revolution (Oxford Business Group, 2020).

However, whether the presence of a mass medium is felt online or offline, communication scholars identify some fundamental roles the mass media perform. Traditionally, the mass media educate, entertain and keep people abreast of happenings (Singh & Pandey, 2017). Apart from these traditional functions of the media, Sharma (2015) submits that the mass media play the roles of instruction (provides knowledge and socialisation), correlation (understanding of the society) as well as debate and discussion. Specifically, adoption of the mass media to communicate health education to people keeps growing (Akpobo, 2015; Bala, Strzeszynski & Opor-Madry, 2017; Rogala, 2017; Schliemann, et al., 2019).

Media messages provide information about factors such as disease outbreaks, symptoms, modes of transmission, fatality rates, treatment centres, drugs and prevention methods (Wogu et al., 2019:2).

Research also establishes that the mass media set public agenda through editorial, feature and news writing. For example, editorials critically anal-

yse current trends in the public sphere, and formulate informed opinions on such issues (Kheshgi, 2013 and Silachai & Poonpon, 2016). Then, through news stories, members of the public are educated and enlightened about societal happenings. This function is described by Oriela and Ogbiten (2016) as societal surveillance of the mass media. For news features, opinions are framed in a way that moulds people's views on issues (McCombs, 2011). In this wise, the opinionated writing which is always presented by columnists can be sarcastic, rhetorical, informal, imperative, aggressive, among others (BBC, 2016).

Also, the use of collocation (the choice of grammatical parts of speech-verb, adverb, adjective and noun) to craft these forms of writing is capable of setting media agenda for public consumption. Specifically, Allen (2017) argues that collocation is used to set a second level media agenda- a level that describes issues with word choices. According to him, often times, nouns and adjectives are two vital parts of speech that show how words are collocated in written texts. For example, an adjective can collocate with a noun to give a deeper meaning (e.g., Chinese virus) while a noun too can collocate with another noun to give a special interpretation (e.g., Covid-19 lockdown).

Thus, empirical evidence indicates that the mass media has a very vital role to play in crisis situations when infodemics becomes the order; hence, people crave for accurate, informative, educational, insightful and analytical pieces of information (Maduka, et al., 2015). Consequently, records have shown that the mass media in Africa had one time or the other responded to various public health emergencies in different ways. For example, when the first case of Ebola Virus Disease (EVD) broke out in Nigeria on July 20, 2014, the Nigerian media landscape responded to the infection early by informing and educating Nigerians about the virus, symptoms, causes, precautions and safety measures (Akpobo, 2015; Maduka, et al.,

2015; Smith & Smith, 2016), thereby facilitating the early containment of the virus. According to Smith and Smith (2016), early measures such as early closure of schools and late opening of schools contributed immensely to the fight against EVD in Nigeria. When monkey pox was recorded in the country, Oyeboji et al. (2019) argue that though the media reported the new disease, their information only emphasised the number of cases, deaths, new cases and government's responses. However, their stories were marred with 'inaccurate, sensationalised or misleading stories' that could 'hinder actions to safeguard health.' That time, the media framed the disease as 'fatal', 'dreaded', 'deadly', 'spiritual' or 'rare'.

In addition, the constant outbreak of Lassa fever in Nigeria is underreported by the Nigerian media, and that has really been affecting people's holistic approach to its prevention and safety measures (Wogu et al., 2019b). On the other hand, during the media campaign about Lassa fever in Ebonyi State, Nigeria was prompt when its first case was recorded in 2012, to the extent that media messages were created in people's native language with a view to sensitising them about its causes, symptoms, consequences and preventive measures (Wogu, 2018a). Interpretatively, the power of the mass media is so enormous that their reportage can be tilted towards an agenda or against it as seen in the scenarios earlier painted. In fact, empirical evidence shows that what impact an incidence has on the people (Amoroso et al., 2018) as well as how prominent and near it is to them (Parks, 2018 and Boukes, Jones & Vliegthart, 2020) greatly determine the coverage time of such an event/happening.

As observed by these authors, the Nigeria media, especially the ones that enjoy online presence, were divided into about three categories while reporting news about Covid-19 in its early outbreak. One group dished out misinformation (unintentional inaccuracies), disinformation (fabrications/deliberate manipulation) and malinformation (deliberate information sent

out for a purpose) to people about the pandemic; the second group only reported cases, deaths and recoveries in form of news or drew insights from the pandemic in form features and editorials, while the third group denounced the infodemics pushed out by the first group. For example, Nwakpu, Ezema and Ogbodo's (2020) finding revealed that the coverage of Covid-19 pandemic by four Nigerian newspapers was dominated by straight news (71.3% or 763) of all the items they analysed. Opinionated articles followed; then features and editorials with 15.8% or 169, 11.2% or 120 and 1.7% or 18 respectively. The Punch Newspaper reported the outbreak more frequently than the other three newspapers- The Sun, The Guardian and Vanguard. Their finding also shows that the way the newspapers framed the pandemic encouraged Nigerians to take precautionary measures against the new virus.

Now that literature has established a mixture of media attention and social responsibility in the early coverage of previous health crises such as Ebola Virus Disease (EVD), Lassa fever, Monkey pox and even the novel Covid-19 in Nigeria, it becomes imperative to appraise the early media coverage of a new health crisis, Covid-19. The evaluation, which is focused on selected West African media, aims at investigating the nature of the media coverage during the early outbreak of Covid-19 pandemic, the kind of agenda the West African media set during the early stage of the crisis together with the responsibilities discharged by the West African media during the early stage of the new virus. To ascertain the focus of the media agenda during the studied period, authors explored the informative and educative functions of news stories, the agenda positioning function of editorials as well as the analytical function of news features across the selected news media.

THEORETICAL UNDERPINNING

The theoretical base upon which this study stands is the agenda setting theory which focuses on the kind of impact that the mass media could have on issues as a result of the importance or prominence attached to such issues. In crisis situations, such as the one under study, the agenda the media set becomes very important as there is tendency for increased need of information by the people. This makes media organisations the first point of call for them to fulfil the needs. In specific terms, the agenda theory hypothesizes that the mass media possess the ability to transfer the salience of issues on their news agenda to the public agenda (Griffin, 2011). In other words, Weiss (2009) affirms that there is a relationship between the emphasis the mass media place on issues and the importance media audience attaches to those issues. Invariably, when crisis situations occur, “the media may not only tell us (people) what to think about (the crisis), they also may tell us how and what to think about it, and perhaps even what to do about it” (Weiss 2009: 384).

Studies have posited that the roles that the mass media play in emergency situations vary from disseminating information and providing update on the situation (Lowrey, Evans, Grower, Robinson, Ginter, McCormick & Abdolrsunia, 2007) to influencing public responses to the situation at hand (Leask, Hooker & King, 2010) as well as facilitating interaction between the government and the citizens (Riegart & Olsson, 2007) in the course of meandering through the situation. Li (2010:271) also summarizes six roles of the media during crisis. These include warning of predicted or impending disasters; conveying information to officials and the public; charting the progress of relief and recovery; dramatizing lessons learned for future preparedness and taking part in long term public education as well as defining slow-onset problems as crises or disasters. In performing these

roles, the media influence and shape public opinion either intentionally or unintentionally (Weiss, 2009). It is therefore not arguable that the media possess enormous power to set agenda and frame issues which influence what people perceive about these issues, the action they take about the issues and how they think about those issues (Leask, Hooker & King, 2010).

Within the agenda setting discourse, there are three identified types of agendas – media agenda, public agenda and policy agenda (Weiss, 2009). While the issues that the media give salience through their coverage constitute their own agenda, public agenda points to the most important issues from the perception of the members of the public (Weiss, 2009; Griffin, 2011). Policy agenda captures the prioritized issues that government and policy makers take action on. Thus, the agenda setting theoretical framework is an interaction between media, public and policy agendas. Nevertheless, the media agenda, which is the main focus of the agenda setting theory, could be located at two levels. The first level agenda could be largely seen in media content such as news, editorials, features and opinions (Khesgi, 2013; Silachai & Poonpon, 2016). Content that could directly mould people's perception on issues constitute the first level agenda (McCombs, 2011). On the other hand, the second level agenda setting occurs with word choice or vocabulary deployed towards framing issues (Allen, 2017). This implies that the media set agenda at two levels – through direct content as well as in the choice of words in describing issues and events.

Situating this within the context of this study, it is pertinent to examine the roles played by the selected media in the early coverage of the new Coronavirus pandemic in the selected West African countries. This is important because the first stage of any crisis or public health issues is critical in dictating the flow of actions taken in combating the crisis. If the agenda set by the media in any crisis situation is capable of influencing public response

to such crisis, then, there is a need to investigate the kind of agenda set by the media during the early response stage of the public health emergency. There must be an examination of how the increase in global and national cases of COVID-19 affects the first level agenda setting functions of the select West African newspapers. Also, the extent to which attributes of the second level agenda setting functions of the select newspapers reflect and resonate with public and policy agendas has to be examined in the reportage of the pandemic by the select newspapers in the region.

RESEARCH QUESTIONS

The following research questions guide the study:

1. What forms of roles did the newspapers play at the early stage of COVID-19 transmission?
2. To what extent did increase in global and national cases of COVID-19 contribute to the use of first-level agenda setting functions [education and information, interpreting and guiding as well as forming opinions and guiding] by the select West African newspapers?
3. What attributes of second level agenda setting functions [noun, adjective and verb] reflected and resonated most with public and policy agendas in the select formats of reporting employed by the newspapers?

METHODOLOGY

Quantitative content, explication textual and collocation analyses were the research methods employed for understanding the kinds of agenda set by the West African newspapers in the early stage of disease. The quantitative content analysis was carried out with the aid of process tracing research

design. This is a design that afforded the researchers the opportunity to pinpoint relevant texts in the news reports of the newspapers and place them into the formulated categories meant for interrogating forms of roles played by the newspapers. Explication textual analysis was used at the second stage of the methodology. Since one of the objectives of the study is to find out how the media want the public and governments to see and respond to the disease, this method becomes relevant as it guides the researchers to pinpoint social and political significance of the reported stories. Identifying the social and political importance of the stories is not sufficient considering the fact that the disease is a pandemic; hence, collocation analysis was also adopted to fill the gap. It was employed with the intent of establishing validity and creating holistic view of the agendas set by the selected newspapers (Mello, 2012). Specifically, collocation analysis helped in understanding the issues and needs put forward to the public and concerned stakeholders in government within the context of second level agenda-setting with the specific reference to description, prescription and prediction of issues and needs related to the disease.

The most popular newspapers (Alexa Rank, May 15, 2020) in Ghana, Nigeria, Liberia, Sierra Leone and The Gambia were selected. With Alexa Rank, the researchers were able to know that *Ghana Web* (Ghana), *The Punch* (Nigeria), *Front Page Africa* (Liberia), *Sierra Express Media* (Sierra Leone) and *The Point* (The Gambia) were the most popular newspapers as at the time of collecting data for the study. This led to adoption of purposive sampling technique for the selection of the newspapers. This method was also adopted for selection of news stories with exemption of interviews and videos that were coded in addition to systematic and available sampling techniques. While using systematic sampling technique, a 3-day interval was considered for the selection of Coronavirus or Covid-19 stories. For representative samples, WayBack Machine (an online archived

software) helped us in selecting stories that were available for analysis. In this regard, available sampling technique was employed as the third sampling technique. However, two newspapers -*Sierra Express Media* and *The Point*-with very small sample size as archived by WayBack Machine were substituted with the next in rank and high sample size. In Ghana, the coding was done from the paper's repository because its front page does not capture all the Coronavirus-related news for the months.

While formulating the categories, emphasis was placed on formats of reporting. The newspapers' roles of educating and informing the public about the disease were measured using news format. Interpreting issues and needs around the disease was determined through features while forming opinions and guiding governments and citizens were measured using editorial format. These roles were considered as first-level agenda setting functions of the selected newspapers. The coded stories were analysed using descriptive statistics with the specific reference to simple frequency count and percentage. We also used corpus analysis aided by Voyant-tools (www.voyant-tools.org). Two stories for each format were selected from each newspaper for corpus analysis that helped in locating top five trended keywords that aided interpretation of second-level agenda setting of the newspapers.

ANALYSIS & DISCUSSION OF FINDINGS

The first data source was the newspapers. Ghanaian newspaper had stories for 23 days. It was 26 days and 24 days for Nigerian and Liberian newspapers respectively. In Sierra Leone and The Gambia, we found 22 days and 20 days accordingly. In all, the chosen newspapers reported in 117 days. Out of these days, stories were highly reported in March (49 reports) and January (35 reports) than in February (33 reports).

Out of the five selected papers, only two of them (Nigeria and Ghana) have repositories for Coronavirus on their front pages. However, Liberia's paper has a health column where health-related issues are uploaded. This indicated media readiness on the part of the two media houses to provide information for the readers. For the selected periods in the 3 months for Liberia, it was observed that the front page stories of the selected paper was not regularly updated as expected, though the topmost part of the home page was regularly updated. When the virus broke in the country on March 16, Coronavirus stories dominated the front page of the paper for that day (this shows impact and prominence).

The newspaper selected in Sierra Leone also lacks regular updates. It also has a health column on its front page. From January 1 to January 18, there were no stories; instead, December stories were still on its home page. In February, reportage of some days remained on the home page till the following days (three instances were observed). A similar trend occurred in March where front page stories were left un-updated for days. The Gambia's newspaper also had a column for health. For the first time in 3 months, the Gambian newspaper wrote an editorial on 18th March, the second day Covid-19 was recorded in the Gambia (it added its voice). On this day, Covid-19 news dominated its home page. In fact, foreign stories on Covid-19 were not left out, a practice that was not in place prior to 18th March. The only Covid-19 story reported in the selected paper in Sierra Leone was foreign as it commiserated with China on the outbreak of the virus. The coding of the reports of the newspapers indicated that 944 reports were published, and established that the newspapers educated and informed the public about the disease in March, 2020.

This was quite different from what we found in February (67 reports) and January (10 reports). Reports that established the issues around the disease and guided the audience were published mostly in March (37) more than in

January (3) and February (2). We equally found that the newspapers published reports that warned and guided governments and other stakeholders about the possible consequences of not taming the spread of the disease in March (12) than in January and February, which had one report each.

Examining the publishing period of the reports, we discovered that the selected Liberian, Sierra Leonean, Ghanaian and Gambian newspapers had no publishing time on their stories (Not Available-NA). In Nigeria, the first story reported on Coronavirus by *The Punch* was on 15th January. In the headline, the NCDC was quoted to have said they were ready for Coronavirus in Nigeria. After the first case was reported in Nigeria, *The Punch* created a repository tagged 'Coronavirus Crises 24/7 Updates' before it was later changed to 'Covid-19 Updates.' Ghana's repository was tagged 'Coronavirus News Updates.'

From the available data, it emerged that the chosen newspapers reported mostly in February and March than in January. This is understandable considering the fact that the countries started having cases in February. Nigeria recorded its first case on February 27, 2020 while Ghana, Liberia, The Gambia and Sierra Leone had their first case on March 13, 16, 17 and 30 respectively (Worldometers, 2020). In all, a total 305 cases were recorded between February and March, 2020 in the countries, while global cases spanning January and March, 2020 were 1,041,737 (Worldometers, 2020).

Table 1: First Level Agenda Setting in Select Newspapers

<i>January, 2020</i>	<i>Education and Infor- mation</i>	<i>Interpreting and Guiding</i>	<i>Forming Opin- ions and Guiding</i>
Ghana	0.00	0.0	0.00
Nigeria	70.00	66.66	100
The Gambia	0.00	0.0	0.00
Sierra Leone	0.00	0.00	0.00
Liberia	30.00	33.33	0.00
<i>February, 2020</i>	<i>Education and Infor- mation</i>	<i>Interpreting and Guiding</i>	<i>Forming Opin- ions and Guiding</i>
Ghana	0.00	0.00	0.00
Nigeria	25.37	0.00	0.00
The Gambia	7.46	50.00	0.00
Sierra Leone	1.49	0.00	0.00
Liberia	14.92	50.00	100
<i>March, 2020</i>	<i>Education and Infor- mation</i>	<i>Interpreting and Guiding</i>	<i>Forming Opin- ions and Guiding</i>
Ghana	82.30	29.72	50.00
Nigeria	8.68	29.72	8.33
The Gambia	4.87	21.62	8.33
Sierra Leone	0.21	0.00	0.00
Liberia	3.91	18.91	33.33

Source: Authors' Analysis, 2020

Key: Numbers in percentage

On the basis of first-level agenda setting as presented on Table 1, the Nigerian newspaper educated, informed and guided the public in January when the country was yet to have any case. Liberian newspaper focused on guiding more than informing the public about how to prevent spread of the disease. The selected newspapers from Nigeria and Liberia maintained their lead in terms of educating, informing and guiding the public in February. In March, Ghanaian newspaper led in the area of educating and informing the populace about the disease than other newspapers. These results are

in consonance with the earlier study on the disease which established that selected Nigerian newspapers prioritised straight news over opinionated articles, features and editorials (Nwakpu, et al., 2020). The results also align with the studies of Akpobo (2015), Maduka, et al. (2015), Smith and Smith (2016) that established early response of the Nigerian newspapers within the context of educating and informing the public about Ebola Virus Disease (EVD) in 2014.

Table 2: Word Trends in Select Formats of Reporting of the Select Newspapers

<i>Ghana</i>	<i>First Trend</i>	<i>Second Trend</i>	<i>Third Trend</i>	<i>Fourth Trend</i>	<i>Fifth Trend</i>
<i>Forming Opinions and Guiding</i>					
Eternal vigilance should be the watchword	China	Corona	Ghanaians	Health	Virus
How prepared are we for the fatal coronavirus?	Centres	Government	Health	Outbreak	Public
<i>Interpreting and Guiding</i>					
Coronavirus: 'Mr president, your shirt'	Country	Mr	President	Philadelphia	Remind
The socioeconomic implications of COVID-19: Idealism vs Realism	Affected	Contingency	Going	Health	Measures
<i>Education and Information</i>					
Anxiety grips Tema Chinese shop attendants over Coronavirus	China	Chinese	Country	Virus	Workers
Parliament throws searchlight on coronavirus prevention in Ghana	Adequate	Called	Coronavirus	Disease	Ghana
<i>Nigeria</i>					
<i>Forming Opinions and Guiding</i>					
Preventing a Covid-19 epidemic	Cases	China	Countries	Country	Disease
Coronavirus crisis: Govt's complacency unpardonable	Countries	Country	Disease	Nigeria	World
<i>Interpreting and Guiding</i>					
Lock down Nigeria now!	Cases	Coronavirus	March	Nigeria	People
Likely socio-economic impact of COVID-19 on Nigeria	Budget	Coronavirus	Monday	People	Water

<i>Education and Information</i>									
Nigeria records second coronavirus death	111		Cases	Edo	Confirmed	Contacts	Recorded		
Nigeria's coronavirus cases hit 81 as NCDC announces 11 new cases	Cases				Enugu	New	Nigeria		
Liberia									
<i>Forming Opinions and Guiding</i>									
In Union Strong, Success is Sure! We Can Beat the Coronavirus	Cases			Coronavirus	Crisis	Ebola	People		
Calling the Names of Those Coming Down with COVID-19 Is Wrong; Stop the Stigma, Mr. President, Min. Nagbe & NPHIL	Blama			Case	Health	Mr	President		
<i>Interpreting and Guiding</i>									
Tolbert Nyenswah: Building Testing Capacities Key to Curbing Coronavirus in Liberia	Capacities			Countries	Covid	Health	Testing		
Does Wearing Mask Prevent You from Getting Covid-19? This Is What Experts Think	Covid			Face	Mask	Masks	People		
<i>Education and Information</i>									
COVID-19 Ruled Out; Chinese on Fishing Vessel Dies from Heart Attack	Authorities			Body	Death	Early	Vessel		
Liberia Confirms Third Coronavirus Case, Contacts Tracing Underway	FrontpageAfrica			Health	Minister	New	Positive		

Table 2 contains data that established keywords that dominate the reports of the newspapers at the early stage. It is noticeable that emphasis was on the likely impacts of the disease on people. They equally referred to China, rising cases in the world and their expectations from the government officials, especially Presidents and Ministers of Health. These results are understandable within the expected roles of the media during crisis situation as stressed by previous scholars (Lowrey et al., 2007; Leask, et al., 2010; Li, 2010; Oyebanji, et al., 2019). Examination of the first level agenda setting functions of the newspapers along with global and national cases indicates that the functions were more correlated with global cases more than the national cases. In terms of variation in the cases, the functions also generated significant prediction in the global cases than in the national cases [*see Table 3*]. In this regard, it could be explained that the newspapers want the public and government officials to understand severity of the disease by alluding to the spread and containment characteristics or issues (McCombs, 2011).

Table 3: Global and National Cases Prediction from First Level Agenda-Setting Roles of the Select Newspapers

Global Cases	R	R Square	Adjusted R Square	Std. Error of the Estimate
Educating and Informing	.787 ^a	.619	.239	31.24953
Interpreting and Guiding	.997 ^a	.995	.989	2.53577
Forming Opinions and Guiding	.563 ^a	.317	-.366	28.12316
National Cases				
Educating and Informing	.591 ^a	.350	.133	29.40550
Interpreting and Guiding	.277 ^a	.077	-.231	33.49887
Forming Opinions and Guiding	.137 ^a	.019	-.308	63.72492

^a Global and National Cases as Predictors

Table 4: Emerging Attributes from First Level Agenda Setting for Second Level Agenda-Setting of Ghanaian Newspaper

First Level Agenda	Trends versus Collocative Words				
	<i>Virus</i>	<i>Health</i>	<i>China</i>	<i>Corona</i>	<i>Ghanaians</i>
Forming Opinions and Guiding 1	Far, carrier, cases, China, communities	Agyeman, Manu, initiated, Kweku, Minister	Cameroonian, celebrate, Ghanaians, gone, goods	Virus, air, cases, devastation, far	Away, China, Chinese, concern, considering
Forming Opinions and Guiding 2	<i>Centres</i>	<i>Government</i>	<i>Health</i>	<i>Outbreak</i>	<i>Public</i>
	Designate, areas, case, designated, directed	Public, add, contained, emergency, fail	Potential, cases, centres, conscious, curb	Caused, control, death, possible, readiness	Government, inform, public, cooperative, coronavirus
Interpreting and Guiding 1	<i>Country</i>	<i>Mr</i>	<i>People</i>	<i>Philadelphia</i>	<i>Remind</i>
	Need, action, Ghana, people, remind	President, god, maybe, remind, 1918	Country, forgive, people, actions, advantage	1918, according, cancel, didn't, pandemic	Need, country, Mr, President, aids
Interpreting and Guiding 2	<i>Affected</i>	<i>Contingency</i>	<i>Going</i>	<i>Health</i>	<i>Measures</i>
	Areas, aside, contain, countries, critically	Plan, affairs, best, capturing, cater	Disadvantaged, survive, affairs, basic, children	Complications, health, organisation, access, achieve	Designed, affected, aside, best, capturing
Educating and Informing 1	<i>China</i>	<i>Chinese</i>	<i>Country</i>	<i>Virus</i>	<i>Workers</i>
	Added, brought, citizen, colleagues, lives	Whilst, attending, brought, citizen, concentration	According, borders, country, instruction, protect	Added, detected, entering, informed, lives	Nose, spectacle, attending, condition, gears
Educating and Informing 2	<i>Adequate</i>	<i>Called</i>	<i>Coronavirus</i>	<i>Disease</i>	<i>Ghana</i>
	Called, calling, cases, cleanliness, Coronavirus	Adequate, cases, cleanliness, committee, coronavirus	Adequate, called, capacity, cases, central	Ghana, cater, China, come	Disease, bemoaned, called, case, come

Table 5: Emerging Attributes from First Level Agenda Setting for Second Level Agenda-Setting of Nigerian Newspaper

First Level Agenda	Trends versus Collocative Words				
	Cases	China	Countries	Country	Disease
<i>Forming Opinions and Guiding 1</i>	Reported, country, death, develop, died	Korea, South, China, according, burden	High, Asia, burden, challenge, China	Disease, anybody, based, benefiting, cases	Country, based, burden, catch, China
<i>Forming Opinions and Guiding 2</i>	Countries Ban, high, including, Nigeria, entering	Country Disease, entering, Italy, parts, people	Disease Country, people, approach, cases, challenge	Nigeria Countries, handle, applying, ban, basis	World China, 10,000, able, Adhanom, cases
<i>Interpreting and Guiding 1</i>	Cases Lagos, cases, confirmed, virus, March	Coronavirus Nigeria, infected, public, timeline, Abuja	March New, confirmed, March, Nigeria, cases	Nigeria Confirmed, coronavirus, March, timeline, Abuja	People Infected, Nigeria, state, weeks, aeroplane
<i>Interpreting and Guiding 2</i>	Budget Ahmed, barrel, capital, cars, cut	Coronavirus Infections, Nigerians, 4,000, aviation, Canada	Monday March, reported, trading, 15,000, Canada	People Stay, attendance, authorities, China, communities	Water Communities, people, provision, dry, embrace
<i>Educating and Informing 1</i>	/// Confirmed, cases, covid, country, increased	Cases 111, coronavirus, country, covid, death	Confirmed 111, cases, covid, increased, press	Contacts Date, follow, isolate, returnees, till	Recorded Fatality, weekend, 111, cases, confirmed
<i>Educating and Informing 2</i>	Cases Covid, Lagos, March, recorded, state	Edo Enugu, 55pm, Bauchi, cases, covid	Enugu Edo, Lagos, state, Osun, Rivers	New Cases, recorded, announced, bringing, capital	Nigeria Reported, cases, centre, control, country

Table 6: Emerging Attributes from First Level Agenda Setting for Second Level Agenda-Setting of Liberian Newspaper

First Level Agenda	Trends versus Collocative Words				
	<i>Cases</i>	<i>Coronavirus</i>	<i>Crisis</i>	<i>Ebola</i>	<i>People</i>
Forming Opinions and Guiding1	Countries, reported, re- porting, 143, al	Clearly, covid, preventing, action, actions	Management, crisis, masks, asking, aspects	Economic, accord- ing, active, affected, business	Contact, 184, abroad, affected, close
Forming Opinions and Guiding2	<i>Blama</i>	<i>Case</i>	<i>Health</i>	<i>Mr</i>	<i>President</i>
	Talk, allegations, bash- ing, began, callers	Phillips, Blama, chase, come, con- tact	Workers, assured, au- thorities, began, behind	Blama, person, presi- dent, radio, add	Tried, Weah, 13th, assured, audio
Interpreting and Guiding1	<i>Capacities</i>	<i>Countries</i>	<i>Covid</i>	<i>Health</i>	<i>Testing</i>
	African, Ambulance, building, confident, control	Health, systems, weak, able, Africa	Capacities, care, case, cases, chain	Care, challenged, countries, develop- ing, facilities	Capacities, capacity, covid, Liberia, Africa
Interpreting and Guiding2	<i>Covid</i>	<i>Face</i>	<i>Mask</i>	<i>Masks</i>	<i>People</i>
	Attending, hospital, per- son, staffs, transmitted	Masks, mask, use, people, protection	Use, people, having, wear, wearing	Adding, use, wear- ing, cause, CDC	Mask, droplets, face, use, like
Educating and In- forming1	<i>Authorities</i>	<i>Body</i>	<i>Death</i>	<i>Early</i>	<i>Vessel</i>
	National, BMC, covid, deadly, death	Reportedly, Tues- day, accessing, attack, early	Vessel, authorities, cap- tain, cause, Chinese	BMC, Tuesday, 829, attack, authorities	Death, Liberia, pier, reportedly, 829
Educating and In- forming2	<i>FrontpageAfrica</i>	<i>Health</i>	<i>Minister</i>	<i>New</i>	<i>Positive</i>
	Confirmed, development, Eugene, learned, Lenn	Announce, con- vene, Jallah, March, Minister	Confirmed, convene, development, Eugene, Jallah	Calm, case, country, disease, government	Coronavirus, disease, person, son

Explication

The data from Table 4 to Table 6 further indicates the derivation of first level agendas from the second level agendas with the specific reference to the collocation of the trended keywords with verbs, adjectives and nouns used by the newspapers. The explication analysis presented below shows that the newspapers set a mixture of public and policy agenda with the adoption of descriptive, prescriptive and predictive words. This has earlier been described as a means of establishing and reinforcing second level agenda setting with word choice or vocabulary deployed towards framing issues (Allen, 2017). They equally leveraged verbs, adjectives and nouns that have tendency of calling concerned government officials and the public to the benefit of being proactive in preventing entry and containment of the disease. Citizens are not also left out. Where possible, both the citizens and governments were reprimanded when the cases rose in March. Arguably, the newspapers analysed issues that must be addressed towards total containment of the disease spread (Kheshgi, 2013 and Silachai & Poonpon, 2016).

Ghanaian Newspaper

How prepared are we for the fatal coronavirus?

*As seen in other countries where Covid-19 had started ravaging, Ghana too was leaving no stone unturned to protect her citizens against the virus. The paper, therefore, re-echoed government's measures such as hand washing with soap, personal hygiene and social distancing (**Forming Opinions and Guiding 2**).*

Coronavirus: 'Mr president, your shirt'

*A satirical piece that analyses the look-worm attitude the Ghanaian President took over the spread of Covid-19 in the country. Instead of playing politics with the pandemic, the president is advised to ponder on the Ghanaian economy (**Interpreting and Guiding1**).*

Anxiety grips Tema Chinese shop attendants over Coronavirus

Ghanaians and Non-Ghanaians at a community put on their face masks while attending to customers despite that the virus was not yet detected in Ghana. People were advised to take their protection very serious. The fear people had for the virus had affected sales (Educating and Informing1).

Nigerian Newspaper

Coronavirus crisis: Govt's complacency unpardonable

The Nigerian government isn't serious yet for Covid-19 containment. Despite the government's measures, cases kept increasing. Experts advised that panic and complacency be avoided if the fight against the virus would succeed. The government wasn't swift in issuing containment measures to the public. The number of testing centres was low compared to the population. Covid-19 is not Ebola, and not banning visitors coming into the country and locking people down on time was disastrous to the country. People needed enlightenment on personal hygiene while foreign travellers coming here be isolated for 14 (Forming Opinions and Guiding 2).

Nigeria's coronavirus cases hit 81 as NCDC announces 11 new cases

The NCDC announced Nigeria's Covid-19 cases reaching 81 after 11 new cases were recorded (Educating and Informing 2).

Liberian Newspaper

Calling the Names of Those Coming Down with COVID-19 Is Wrong; Stop the Stigma, Mr. President, Min. Nagbe & NPHIL

Debunking Covid-19-related rumour in Liberia, the government got it morally wrong to have named the index case of Covid-19, as the person was subjected to public fright and stigmatisation. The index case was later tongue-lashed and insulted on the social media (Forming Opinions and

Guiding 2).

Does Wearing Mask Prevent You from Getting Covid-19? This Is What Experts Think

Using face masks throughout the day is harmful to one's health as breathing more in it attracts bacteria. Medical experts advise that face mask be used in congested areas or places with a high number of infections. People with flu-like coughs should also use it regularly. Hand washing and sanitising are also important (Interpreting and Guiding 1).

Liberia Confirms Third Coronavirus Case, Contacts Tracing Underway

A 63-year old woman was confirmed positive of Covid-19, and she was given the expected medical attention immediately. Though her contact tracing began, the country's Incident Management Team (IMT) planned to hold a meeting to review the current health measures and issue new ones (Educating and Informing 2).

CONCLUSION AND RECOMMENDATIONS

Based on the findings, this study has established that having the same health crisis does not translate to having a significant and same level of media response at the early stage of the crisis in West Africa. This position is better discerned in the context of the level of media education and immediate knowledge about the crisis, which have implications for deployment of media resources such as appropriation of reporting formats towards setting public and policy agendas for the concerned stakeholders. It is therefore imperative for the media managers to equip their personnel with relevant knowledge of using appropriate reporting formats and techniques ahead of crisis situations, while the knowledge should be prioritised by the personnel.

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The Relationship between Organizational Citizenship Behavior and Job Satisfaction among Physiotherapists of Hospitals of Karachi, Pakistan

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ABSTRACT

This study measured the relationship between organizational citizenship behavior and job satisfaction among physiotherapists located in Karachi hospitals of Pakistan. Further investigated how the variables affected by gender and educational status of physiotherapists. The survey was conducted to collect the data from respondents by adopting the tools of JSS and OCB-checklist. SPSS 21.0 was used for analyzing the data. Pearson correlation and independent sample t-test were applied for association and comparing means of groups. Results revealed that there is positive statistically significant relationship between organizational citizenship behavior with job satisfaction level of physiotherapists. Level of job satisfaction showed not statistically difference with educational level and gender types of physiotherapists. There is also no statistically significant difference

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found in organizational citizenship behavior with educational level, but the statistically significant difference found with gender type of physiotherapists.

Keywords: *Physiotherapist, organizational citizenship behavior, Management, job satisfaction*

INTRODUCTION

A. Background of the study

To hunt the common goals of organizations, different individuals execute the diverse duties in groups or sets as a member of organization. Intellectuals of behavior concern investigated how individuals make groups and work together, and they engrossed on progressions which produce the structures of management to manage the group or organizations, in addition to the progressions for the accomplishment of work. It is very often that the employees' activities and the accomplishment of duty on job are less related to the feelings of him or her towards the workplace where he or she worked but during job work he or she progressed some behavior which showed the actual attitude against the workplace or job work (Robbins & Judge, 2014).

Three distinct categories of behavior suggested by Katz (1964) for employees which they should perform in any organization to operate it effectively. Firstly, people must be stimulated to enroll and stay in the organization. Secondly, people must accomplish the definite prerequisites of their work. Lastly, the activities of them must be advanced and natural for the achievements of organizations' goal which is not enlisted in their job descriptions. This final behaviors' category is known as organizational cit-

izenship behaviors (OCB), by Organ (1988, p. 4), states it to the “individual behavior that is discretionary, not directly or explicitly recognized by the formal reward system, and that in the aggregate promotes the effective functioning of the organizational”.

In simple words, it was also demarcated as extra role, discretionary behavior that assists other members of organizations to accomplish their work or that express the care for and painstakingness towards the organization (Borman & Penner, 2001; Smith, Organ, & Near, 1983). Academics proposed the conceptualizing of extra role behaviors in a diverse way such as altruistic and general compliance in two factor model of Smith et al. (1983), in the same way, altruism, courtesy, conscientiousness, civic virtue, and sportsmanship constructed as a five factor model by Organ (1988) and Allen and Rush (1998) proposed the OCB as a one-dimensional concept. As well as Williams and Anderson (1991) proposed it differently in two dimensional constructs; one is OCB-I that handled the behaviors which engaged directionally to other individuals and the second is OCB-O that handled the behaviors which engaged directionally to an organization. OCB-Is comprised the dimensions of altruism and courtesy of the five-factor model of Organ, although OCBOs comprised the dimensions of conscientiousness, civic virtue, and sportsmanship of the five-factor model of Organ.

Later then, academics also suggested that the OCB's nature is not considered continuously as extra-role or discretionary Organ (1997), but the evaluation of employees by their supervisors taken frequently as OCBs (Allen & Rush, 1998; Pond, Nacoste, Mohr, & Rodriguez, 1997). With emergence of such debates, scholars started the usage of molded conceptualization of organizational citizenship behavior as an extra-task rather than as an extra-role (Borman & Motowidlo, 1993).

While explaining, the prime noting point is that the behaviors which are considered as OCB and categorized as task performance are different. The behavior which is related to the task incline with fluctuate transverse jobs it also required special information, services, and capabilities. Though, for the OCB's categorization there is nothing to worry for the fluctuation across jobs and not required some special information or assistances. For example, the cooperation or voluntary actions of employees are mirrored probable as OCB in any profession and approximately every employee can engage in such behaviors by his or her capability. Task performance is different from the OCB because it is considered as a part of the work role of an employee. Consequently, some positions have an expectation or description as prerequisite for the OCB (Hanson & Borman, 2006). Furthermore, there is also difference in drives of engagement in both OCBs and the accomplishment of regular tasks (Smith, Organ, & Near, 1983).

OCB produces the ease to intact for the social machinery of organization, as well as delivers the work using unanticipated possibilities flexibly (Smith, Organ, & Near, 1983). It can also see as problematic and not capable of being enforced to measure but considered as a very vital in influencing on the company's success specifically long-term success. As it affected on organization for a long-term, the main impact due to more vigorous productivity, protecting capitals, and appealing extraordinary workforces to the organizations (Organ, 1988).

Providentially, scholars have recognized the conditions which stimulate the employees to engaged in OCBs. Spector and Fox (2010) discussed the demands which have specific role for OCBs, such demands put pressure on employees to obligate OCBs. As an example, the failure of a coworker in performance produced a demand which motivate the employee to oblige an OCBs. Employees felt of support needed to execute their

own projects with the other coworkers if duties are inter-reliant. If conditions are there where the forced involved on employees to accomplish more tasks produced the conclusion of negative consequences such as negative feeling and counter-productive work behavior (Bolino, Turnley, Gilstrap, & Suazo, 2010; Fox, Spector, Goh, Bruursema, & Kessler, 2012; Vigoda-Gadot, 2006). Furthermore, compensation also showed more probable effect in cumulation of the OCB's frequencies (Werner, 2000).

The satisfaction towards job as a concept expanded significantly in industrial organizational psychology and organizational behavior due to its effect on the performance and efficiency (Mullins, 2007). One from many predictors, jobs satisfaction is also considered as the most important predictor of OCB. Many studies revealed the association significantly between satisfaction on job and OCBs (Bateman & Organ, 1983; Smith, Organ, & Near, 1983; Organ & Konovsky, 1989). Two conceptions about the effect of job satisfaction on OCBs based as: first suggested that the higher the satisfaction level of individual produced the increase experience related to the frequency of positive state of mood, that's why tendency increased to engaged in OCBs. Second suggested a very leading description, depended on social exchange theory, if the satisfaction of an individuals is high with their jobs, they responded these efforts via OCBs. Therefore, satisfaction and OCB are determined as a causal connection (Bateman & Organ, 1983; Fassina, Jones, & Uggerslev, 2008).

Understanding the precise nature of job satisfaction is not an easy attempt specifically with its effect on the effectivity of organizations. Mullins (2007) argued that it is not just an attitude or the inner state, but it has association with the personal sense of success, whether quantitative or qualitative. Moreover, the premise of its conception is that the most productive employees were highly satisfied ones. Mullins (2007) proposed three approaches to job satisfaction: first one is that the satisfaction as the

outcome of behavior: This revealed the evaluation of employees regarding the production of results related with desires, purposes, standards, or objectives which are very important to them. Second one is that satisfaction as a cause of behavior: This stressed on the behavior that ascended because of dissatisfaction. Those employees who do not consider themselves as capable entity for changing the results which dissatisfied them are mostly struggled to get the results from exterior work or maybe in any alternative organization. In contrast from those employees who are satisfied because of learning from their work revealed the increased feeling of involvement. Third one is that satisfaction as part of a checking and establishing method: This highlights the changes of introduction as consequence from the degree of evaluation of results. Those employees motivated to move on for further search of enhancements if they are not satisfied with what they obtain. In contrast from those who are satisfied they must be motivated for repetition in behavior to become leading.

In the same way, as the reputation, Spector (1997) rationalized by three reasons: the first one is that the values of humanity directed the organizations. The values proposed that the employees should be treated as honorable and respectful. So, the degree of values which showed the conduct of employees can evaluate as a gauge through job satisfaction. The mental appropriateness or emotionally healthful revealed as a symbol of very high level of job satisfaction. Second one is that the processes of organization probable influenced by the behavior of an employee which depend on the extent of satisfaction or dissatisfaction towards his job. While positive behavior progressed the job satisfaction and vice versa. Third one is that the most supportive improvement is the leaders in organizational level. The only reason explained above revealed the enough authentications for the significance of job satisfaction and gave the savvy of job satisfaction procedures.

The practitioners of physiotherapy who are known as physiotherapists in Pakistan are growing speedily. As a developing country here fields of health cares are also in developing phase and physiotherapy is one of the neglected fields in Pakistan. Unluckily, not a single authority as a central regulation in Pakistan is found for physiotherapy like Pakistan Medical and Dental College (PM&DC) for medical field but associations like Pakistan physical therapy association (PPTA), Pakistan physiotherapy society (PPS), and chartered society of Physical therapy (CSP) operating locally to develop the progress of this profession (Babur, Siddique, & Awan, 2014).

They are the front-line health care professionals who played a critical role in meeting a demand of physical based treatment like massaging, exercising and heat treatment to prevent and screen a common physical disorders and ailments (World Physiotherapy, 2021). As a health-care professional they mostly worked in healthcare organizations as practitioners.

That is why this study was designed to examine the physiotherapists' job satisfaction and organizational citizenship behavior in healthcare organizations, to investigate the relationship between them.

B. Operational definitions

1. Organizational citizenship behavior

OCB refers to the extra task work behavior or voluntary integrative models of an employee. It is divided into two dimensions of OCB - acts directed toward the organization (OCBO) and acts directed toward coworkers (OCBP) and used the OCB-checklist to measure it.

2. Job satisfaction

Spector defined the job satisfaction as “a cluster of evaluation feelings about the job” (1997:22). The nature of this cluster is explained by him in nine facets to identify the job satisfaction and it is used to measure the level of job satisfaction of employees. In simple words a ‘JSS’ instrument.

Organizational citizenship behavior-checklist adopted from Fox, Sector, Goh, Bruursema and Kessler (2012) to measure the OCB of physiotherapists and job satisfaction survey was adopted from Spector (1994) to measure the JS of physiotherapists.

Organizational Citizenship Behavior (OCB)

Organizational Citizenship Behavior is deliberated through Organizational citizenship behavior-checklist (OCB-C) scale, which measured that which employee exhibited the pro behaviors (Fox, Spector, Goh, Bruursema, & Kessler, 2012). The creative instrument of organizational citizenship behavior checklist (OCB-C) contains 42-items to evaluate the frequency of OCB executed by employees. Further, it has also more refined and shortened form with 36-items and 20-item scale. The researcher chose 20 items scale, a refined and shortened form of the original version (42 items), for the purpose as the author suggested that it avoided the methodological relics which distorted the valuation of relations between extra role behaviors and counter-productive work behavior (CWB) (Dalal, 2005).

Items comprised in this scale mirrored the actions both towards organization and towards the people in organization, like colleagues. The in-

cluded some items covered the actions of altruistic that assisted coworkers and some were as opposite to the problems of workplace. Other purposes were the items and length of this scale were short, respondents completed it easily and quickly. Further, checklist covered the two subscales: actions which are directed for the benefits of the organization (OCBO) and actions which are directed for the assistance of coworkers to minimize issues of workplace (OCBP). See Appendices for a full list of questions.

Like an attitudinal measuring rating also the OCB-C scale is a 5-point Likert rating scale. Rating starts from 1-5 scores (Never, Once or twice, Once a month, Once or twice a week, Everyday). While computing scores, all responses added, and the total summed exemplifies the total score. If overall summed scores are higher the level of OCB and if lower the scores the lower the level of OCB. The reliability of this scale obtained by the author which showed the value of internal consistent reliability coefficient alpha is 0.89 and 0.94 for two of the samples of self-report, and 0.94 for the samples of coworker (Fox, Spector, Goh, Bruursema, & Kessler, 2009).

This scale has been applied in a wide range of studies such as used in Bulgaria on the teaching staff (Krastev & Stanoeva, 2013), used to revisit the relationships of OCB with other variables for the identification of antecedents and conclude to reveal the links of conditions and experiences at workplace (Spector & Che, 2014). In the same way, a revisit was found for the separation of OCB and CWB with other variables among the university employees (Spector, Bauer, & Fox, 2010). Another evidence found of the application of this scale from the Nigeria oil workers to discover the determinants of OCB (Uzonwanne, 2014). Another evidence for applying this scale was found on experts of Romanian communication and marketing which confirm the relationship between OCB and job effects (Cristiana, 2012)

Job Satisfaction Survey (JSS)

The definitions of Job satisfaction explain by different authors in separate way, some definitions are there; Pool (1997, p. 272) defined it as “an attitude that individuals maintain about their jobs”. He proposed that perception of individuals about their jobs produced the consequence of this attitude. Henne and Locke (1985, p. 222) refers it to as “an emotional response to a value judgment by an individual worker”, and if job values are fulfilled by an individual and he or she perceived it then he or she will be satisfied. Locke referred it to “a pleasurable or positive emotional state resulting from the appraisal of one’s job or job experiences” (1976, p. 1300). The Locke’s definition revealed the components of affection and cognition (Judge, Parker, Colbert, Heller, & Ilies, 2001). The component of cognitions states the estimation, calculation, and appraisal of the current situation relative to some ideals. But the component of affection mentions the moods and sentiments of an individual’s (Organ & Near, 1985; Organ & Konovsky, 1989).

Job satisfaction is subjective entity and an intellectual thought of individual that exist only in the minds of individual so is very difficult to measure due to its nature (Spector, 2000). While measuring it is necessary to understand the construct conceptually and see both direct and indirect factors which affect it. Meanwhile, it is very difficult that everyone agrees on a single definition and on widely accepted theory which explain the job satisfaction that is why no harmony is found for the best measure of job satisfaction (Spector, 1997).

Job satisfaction survey (JSS) found a best measurement tool of job satisfaction in literatures (Bryman, 2004; Mullins, 2007; Robbins S. P., 2005). It has been researched since 1980s and remained as a tool which is very effective, valid, and reliable. Due to its existing nature, Vroom and Jago (1988) regarded the JSS as a very cautious constructed measure. In JSS,

the pairs of demographics were salary and hourly workers, leadership vs non-leadership, and male vs female. Its effectivity, validity and consistency strengthened due to the improvement of JSS since 1980s.

A tool, as a JSS, developed by the Spector (Spector, 1985) which has basis on the theory of Herzberg' named as two-factor theory of job satisfaction. It has a feature like summed (liker-t) scales of rating as well as completed with attitude scale construction. Spector developed the JSS while categorizing further into nine sub-scales, comprised with alike statements in corresponding sub-scale. These nine subscales are: a) pay satisfaction, b) promotion satisfaction, c) supervision satisfaction d) fringe benefits satisfaction, e) contingent rewards satisfaction, f) operating conditions satisfaction, g) co-workers' satisfaction, h) nature of work satisfaction, and i) communication satisfaction.

A tool of JSS is applicable for all organizations but Spector developed it specially for the public sector and non-profit organizations (Spector, 2000). This scale of JSS is anticipated to covering up the main facets of JS along with its subscales that are clearly distinct in its items. This scale represented the overall responses of an individual's attitude or affection to his or her job (Mullins, 2007).

The validation of the scale of the JSS revealed that five sub-scales (pay, promotion, supervision, co-workers, and nature of work) of it were linked with the Job Description Index (JDI) by Smith et al. (1969). For the sub-scale of supervision showed the range of correlation from 0.61 to 0.80. In the same way, JSS also correlated with the scales and variables of Job Diagnostic Survey (JDS) including job characteristics, age, organizational level, absenteeism, organizational commitment, leadership practices, intention to quit the job and turnover. The reliability of JSS showed the range value of internal consistency reliabilities (coefficient alphas) from 0.60 of coworker to 0.90 of the total scale, based on a sample of 2,870. The scor-

ing pattern of JSS, the 36-item total revealed that the proposed range of scores from 36 to 216, from 36 to 108 determined the dis-satisfaction of an individual, from 144 to 216 for satisfaction, and between 108 and 144 for indecisive or ambivalent (Spector, 1997; 2000).

A. Justification of the study

The focus of this study is to examine the relationship between organizational citizenship behavior (towards workers and organizations) exhibited by the physiotherapists and their level of job satisfaction as working in the hospitals of Karachi, Pakistan. Furthermore, this study also aims to search the educational and gender differences in job satisfaction and organizational citizenship behavior of physiotherapists.

In health care organizations, every department performs their duties compactly with collaborations and the performance of these organization depends on the employees who provide services there. Behavior of an employee's influenced by his satisfaction, and this evaluated the effectiveness of management within organization as well. In Karachi, hospitals have the separate rehabilitates department where the practitioners perform their task and share their workplace with other coworkers and patients. While working as physiotherapists they build relation with not just coworkers but the hospitals as well. In hospitals, nurses got more attention as compared to physiotherapist for rich literature which comprises on the nurses' knowledge, risk factors, job satisfaction, impact of leadership and organizational structures and their behavioral examination on workplace (Basu, Pradhan, & Tewari, 2017; Khan, Jehan, Shaheen, & Ali, 2018; Ng, Choong, Kuar, Tan, & Teoh, 2019).

B. Scope of the study

This study contributes to the empirical literature in the field of organizational management with specific to the behavior and satisfaction of employees of physiotherapy practitioners as physiotherapy since few studies have been done on this sample in Karachi, Pakistan. The results of the study will also inform policymakers about the managing problems of hospitals which faced by the physiotherapists and how the behaviors turned into beneficial behavior for the organizations.

RESEARCH SETTING

Respondents were recruited onsite at three (3) public hospitals from distinct locations at Karachi and all were in urban areas. These hospitals contain separate department of physiotherapy as an organization where head of department, professionals, assistant's physiotherapist, and house job students perform their duties. All hospitals employed physiotherapists in physiotherapy departments in the capacity of required to have direct patient care rehab services, house job students reporting to assistant or to professional physiotherapists. Other staff also work with the physiotherapist such as human resource management staff which organize the recruiting process, finance management and the admin duties as well. One hospital where 20 physiotherapists included professional, assistant, and house job students, and other two had 19 physiotherapists with the same pattern. So, in this study other staff like clerical associates and admin were excluded from sites and physiotherapists were selected while taking into consideration of inclusion criteria for them.

I.METHODOLOGY

While seeing the term with its originality and practice Gauri and Gronhaug (2002, p. 425) states it as “the systematic and logical study of the principles guiding scientific and philosophical investigation”. The guiding investigation of research process comprises research strategy, approaches for data collecting, sampling strategy, the choice of analysis for data, the consideration of ethics and the limitations as well, which researcher considering in this study. In addition, these methods selected for it and the advancement of an inquiry are carefully expected as suitable and effective (Cooper & Schindler, 2006).

C. Research strategy

In any study, it can be an intentional selection for procedures which used to uncover resolutions against the chosen raw queries. Description strategy implied as the research purpose to determine the association between organizational citizenship behavior and job satisfaction and vice versa. Descriptive studies assist to provide data which permits for recognizing relationships or associations between two or more variables (Aaker, Kumar, & George, 2000). This study contains two prime variables: organizational citizenship behavior and job satisfaction, to measure these variables researcher implied the quantitative approach for the feasibility of as the researchers pointed that the nature of mostly descriptive research is quantitative (Burns & Bush, 2002; Churchill & Iacobucci, 2004). Further, proclaim by the Babbie (2004) that the method of quantitative research is also central to the investigating and understanding the relationship between variables.

Leedy and Ormrod (2001) states that the “quantitative research in-

volves the collection of data so that information can be quantified and subjected to statistical treatment in order to support or refute alternative knowledge claims”. It is more suitable because it allows the academics to “objectively measure the variable(s) of interest . . . and remain detached from the research participants so they can draw unbiased conclusions” (Leedy & Ormrod, 2005, p. 95).

D. Target population

Lancaster (2005, p. 153) defined population as “the full set of items or people under investigation”. The total population consists of approximately 59 physiotherapists working in public hospitals of Karachi, Pakistan. On average every hospital contains 19 or 20 physiotherapists, which were selected to participate in our study.

E. Sampling

Leary (2004, p. 118) refers to it as “the process by which a researcher selects a sample of participants for a study from the population of interest”. It permits the academics to evaluate the hidden individualities of the study population. The most important aspects needed to postulate the size of sample: a) variance or heterogeneity of the population; b) magnitude of acceptable error; and c) confidence level (Zikmund, 2003).

In addition, sample size calculated by Cochran’s formula, almost 52 number of samples are needed for the population of 59, where level of significance is 5%. In this study, samples were recruited by implying the technique of probability sampling, simple random sampling which refers to “each sampling element in the population will have an equal probability of being selected” (Neuman, 2014, p. 255).

To collect data from the sample researcher implied the survey technique which has meaningful purpose as Groves commented, “surveys produce information that is inherently statistical in nature. Surveys are quantitative beasts” (1996, p. 389).

F. Research instrument

For measurement or getting data from the sites, the basic format might involve an in-depth interview, or an observation at workplace; nevertheless, questionnaire was chosen by most researchers due to its more objectivity and method of survey (Spector, 2008).

Survey of this study was conducted using questionnaire which comprises closed ended questions in three formats: one is socio-demographic questions, second is questions about organizational citizenship behavior checklist and third is job satisfaction questions. Questionnaire refers to “a list of carefully structured questions, chosen after considerable testing, with a view to eliciting reliable responses from a chosen sample. The aim is to find out what a selected group of participants do, think or feel” (Collis & Hussey, 2003, p. 173). Questionnaire of this study attached in Appendices.

Organizational citizenship behavior-checklist adopted from Fox, Sector, Goh, Bruursema and Kessler (2012) to measure the OCB of physiotherapists and job satisfaction survey was adopted from Spector (1994) to measure the JS of physiotherapists.

DATA ANALYSIS

The quantitative data can be evaluated by hand or by computer. Size of data and the types of analysis (statistical test) determined the type

of approach for analyzing. While seeing the data of this study, the responses of 52 physiotherapists from each of the 52 questions, demographics, and variables' items of scales, also suggested the descriptive and inferential statistics. To fulfill the details of the scope of this study or testing hypothesis and reached on conclusions of research questions, this portion of data analysis requires the breakdown of the data into essential fragments like the following details.

G. Results

SPSS version 21 was used for the purpose of statistical analysis. Cronbach alpha test was applied to test the reliability test of this instrument and levene's test as normality test was also applied. Descriptive statistics were applied for calculation of means, percentages, and frequencies. Moreover, for inferential statistics Pearson correlation test was applied to see the association between variables as well as independent sample t-test was applied for comparing means of organizational citizenship behavior and job satisfaction with other factors like gender and educational status or testing the hypotheses. P-value<0.05 taken as significant value.

The Cronbach alpha value of scale in this study is in the table, which is an evidence of internal consistency or the scales' reliability.

Table 1: Reliability Statistics

Cronbach's Alpha	N of Items
.81	52

Descriptive analysis

Demographic frequencies and percentages were found through SPSS. Following table showed the results:

Table 2: Distribution of socio-demographic data

Variables	Frequency	Percentage %
Gender		
Male	35	67.4
Female	17	32.6
Age		
18-29	17	32.7
30-39	28	53.8
>40	7	13.5
Hospital		
DUH	18	34.6
CH	16	30.8
JPMC	18	34.6
Education		
Graduates	21	40.4
Post-graduates	31	59.6
Working experience		
<6	18	34.6
7-10	24	46.2
>11	10	19.2
Working hours		
<5	5	9.6
6-7	16	30.8
>8	31	59.6

Most of the respondents are in the age range of 30 – 39 years old, followed by 19-29 years old, which is 53.8% and the lowest would be 13.5% age more than 40 years old. The number of female participants is less with the percentage of 32.6 than the males (67.4). The highest percentage of employees had between 7 to 10 years of working experience (46.2%) followed by 34.6% with less than 6 years of working experience but more than 11 years of working experience showed low percentage 19.2. In terms

of educational level, mostly respondents are postgraduates with 59.6% and remaining are graduated with 40.4%. Most respondents perform more than 8 hours of working in a day with 59.6%, followed by from 6 to 7 hours, which is 30.8% and very fewer performed less than 6 hours in a day.

3. Inferential statistics:

a. Correlation between OCB and JS:

Correlational analysis was used to discover the relationship among organizational citizenship behavior and job satisfaction. All responses of respondents feed in continuous form which is also the one proposition for the application of correlational analysis. For this correlational purpose, all responses were computed into single variable for both OCB and JS as continuous form and then correlated test was applied.

Hypothesis 1:

H0; there is no significant relationship between organizational citizenship behavior and job satisfaction level among physiotherapists.

H1; there is a significant relationship between organizational citizenship behavior and job satisfaction level among physiotherapists.

Table 3: Summary results of correlation

	Mean	Std. Devia- tion	N
OCB	68.75	4.989	52
JS	149.75	36.850	52

Table 4: Correlational analysis

		OCB	JS
OCB	Pearson	1	.630
	Correlation		
	S i g .		.000
	(2-tailed)		
JS	N	52	52
	Pearson	.630	1
	Correlation		
	S i g .	.000	
	(2-tailed)		
	N	52	52

Above two output tables showed as a result of correlational analysis, one was the summary results and the second was the correlational table. Summary results showed that the means of JS was in between the scoring pattern of 144 to 216 which demonstrated that mostly physiotherapists were satisfied from their jobs. In the same way the mean score of OCB showed average frequency of physiotherapists. We can conclude that respondents were more satisfied from the jobs and performed low frequency of citizenship behavior. But in the correlational analysis table, where the value of the correlation coefficient between organizational citizenship behavior and the level of job satisfaction is 0.630 and the p-value for two-tailed test of significance is 0.000 which is less than 0.05. So, we reached on the conclusion that there is a significant positive correlation between organizational citizenship behavior and the level of job satisfaction. The value of correlational coefficient is 0.630 after squaring the value and multiply by 100 produce the percentage which explain the extent of prediction of one variable with the other. In this result, after calculating about 39% level of job satisfaction predicting the organizational citizenship behavior.

b. Comparison of JS with educational level of physiotherapists:

Hypothesis 2:

H0; there is no difference of job satisfaction level with educational status of physiotherapists.

H1; there is some difference of job satisfaction level with educational status of physiotherapists.

Independent sample t-test was applied to investigate the compare means, to operate in SPSS first compute all responses against items of variables as separate variable where result shown in continuous forms and then selected the categorical variable for comparing purpose. After this, test was applied. Following tables are shown in output file:

Table 5: Group Statistics for comparison between JS and educational level

	Education	N	Mean	Std. Deviation	Std. Error Mean
Job satisfaction	Graduates	21	118.90	13.382	2.920
	post-graduates	31	120.26	10.912	1.960

Table 6: Independent t-test for comparison between JS and educational level

Job satisfaction	Levene's Test for Equality of Variances		t-test for Equality of Means						
	F	Sig.	T	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
								Lower	Upper

Equal varian- ces as- sumed	.295	.589	-.400	50	.691	-1.353	3.381	-8.143	5.437
Equal varian- ces not assu- med			-.385	37.06	.703	-1.353	3.517	-8.479	5.772

Output results contain two tables one is group statistics, and the other is independent samples test. In group statistics gives the mean level of job satisfaction among the physiotherapists' educational level. Results found that graduates (who were coded 1) showed a little lower level of satisfaction as compared to postgraduates (who were coded 2). Yet, the difference is rather moderate. On average, postgraduates showed merely 2 points more level than graduates. In standard deviation, it is also very small difference in graduates and postgraduates.

In order to confirm or disprove the hypothesis, we have to look at the independent samples test table. This table contain the two portions of the results table one in left side is Levene's Test which determined the variances' equality and second in right side is t-test which determined the means' equality. The value showed very high 0.589 which is higher than the 0.05 so the assumption made that the observed groups have equal variances. As well as it also indicated that which set of means' equalities should be considered for the interpretation of analysis or testation of hypothesis. The respective p-value of two-tailed is .691, which is greater than 0.05. Therefore, a rejection is made for the alternative hypothesis and results determined that the level of satisfaction is not influenced by the educational level in physiotherapists.

c. Comparison of JS with gender types of physiotherapists:

Hypothesis 3:

H0; there is no difference of job satisfaction level among males and females' physiotherapists.

H1; there is some difference of job satisfaction level among males and females' physiotherapists.

Table 7: Group statistics for comparison between JS and gender

	Gender	N	Mean	Std. Deviation	Std. Error Mean
Job satisfaction	male	23	122.39	11.385	2.374
	female	29	117.59	11.996	2.228

Table 8: Independent t-test for comparison between JS and gender

Job satisfaction	Levene's Test for Equality of Variances		t-test for Equality of Means						
	F	Sig.	T	Df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
Equal variances assumed	.038	.847	1.46	50	.149	4.805	3.275	-1.774	11.384
Equal variances not assumed			1.47	48.34	.146	4.805	3.255	-1.739	11.349

Output results contain two tables one is group statistics, and the other is independent samples test. In group statistics gives the mean level of job

satisfaction among the physiotherapists' gender. Results found that males (who were coded 1) showed a little higher level of satisfaction as compared to females (who were coded 2). Yet, the difference is rather moderate. On average, males showed 5 points more level of job satisfaction than females. In standard deviation, it is also very small difference in males and females.

In order to confirm or disprove the hypothesis, we have to look at the independent samples test table. This table contain the two portions of the results table one in left side is Levene's Test which determined the variances' equality and second in right side is t-test which determined the means' equality. The value showed very high 0.847 which is higher than the 0.05 so the assumption made that the observed groups have equal variances. As well as it also indicated that which set of means' equalities should be considered for the interpretation of analysis or testation of hypothesis. The respective p-value of two-tailed is 0.149, which is greater than 0.05. Therefore, the alternative hypothesis is rejected and found that there is no difference of level of satisfaction among males and females' physiotherapists.

d. Comparison of OCB with gender type of physiotherapists:

Hypothesis 4:

H0; there is no difference of organizational citizenship behavior among male and female physiotherapists.

H1; there is great difference of organizational citizenship behavior among males and females' physiotherapists.

Table 9: Group statistics for comparison between OCB and gender

	Gender	N	Mean	Std. Deviation	Std. Error Mean
OCB	male	23	60.65	1.917	.608
	female	29	68.83	3.095	.575

Table 10: Independent t-test for comparison between OCB and gender

OCB	Levene's Test for Equality of Variances		t-test for Equality of Means						
	F	Sig.	t	Df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
Equal variances assumed	.000	.998	-.208	50	.048	-.175	.843	-1.868	1.517
Equal variances not assumed			-.210	48.463	.052	-.175	.837	-1.857	1.507

Output results contain two tables one is group statistics, and the other is independent samples test. In group statistics gives the mean level of frequency of organizational citizenship behavior among the physiotherapists' gender. Results found that males (who were coded 1) showed a little lower frequency of behavior as compared to females (who were coded 2). Yet, the difference is not moderate. On average, males showed 8 points lower frequent behavior of citizenship in organization than females. In the same way, standard deviation also showed a difference of 2 point in males and females.

In order to confirm or disprove the hypothesis, we have to look at the independent samples test table. This table contain the two portions of the results table one in left side is Levene's Test which determined the variances' equality and second in right side is t-test which determined the means' equality. The value showed very high 0.998 which is higher than the 0.05 so the assumption made that the observed groups have equal variances. As well as it also indicated that which set of means' equalities should be considered for the interpretation of analysis or testation of hypothesis. The respective p-value of two-tailed is 0.48, which is smaller than 0.05. Therefore, the null hypothesis is rejected and found that there is significant difference in organizational citizenship behavior among males and females' physiotherapists.

e. Comparison of OCB with educational level of physiotherapists:

Hypothesis 5:

H0; there is no difference of organizational citizenship behavior with educational level of physiotherapists.

H1; there is great difference of organizational citizenship behavior with educational level of physiotherapists.

Table 11: Group statistics for comparison between OCB and educational level

	Education	N	Mean	Std. Deviation	Std. Error Mean
OCB	graduates	21	65.86	3.229	.705
	post-graduates	31	68.68	2.868	.515

Table 12: Independent t-test for comparison between OCB and educational level

OCB	Levene's Test for Equality of Variances		t-test for Equality of Means						
	F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
Equal variances assumed	.012	.915	.211	50	.834	.180	.853	-1.533	1.893
Equal variances not assumed			.206	39.555	.838	.180	.873	-1.585	1.945

Output results contain two tables one is group statistics, and the other is independent samples test. In group statistics gives the mean level of frequency of organizational citizenship behavior among the physiotherapists' educational level. Results found that graduates (who were coded 1) showed a little lower behavior as compared to postgraduates (who were coded 2). Yet, the difference is rather moderate. On average, postgraduates showed merely 3 points more frequently behavior of citizenship in organizations than graduates. In standard deviation, it is also very small difference in graduates and postgraduates.

For confirming or disproving the hypothesis, we have to look at the independent samples test table. In order to confirm or disprove the hypothesis, we have to look at the independent samples test table. This table contain the two portions of the results table one in left side is Levene's Test which

determined the variances' equality and second in right side is t-test which determined the means' equality. The value showed very high 0.915 which is higher than the 0.05 so the assumption made that the observed groups have equal variances. As well as it also indicated that which set of means' equalities should be considered for the interpretation of analysis or testation of hypothesis. The respective p-value of two-tailed is .834, which is greater than 0.05. Therefore, the alternative hypothesis is rejected and found that there is no difference in organizational citizenship behavior among males and females' physiotherapists.

CONCLUSION, DISCUSSION AND RECOMMENDATIONS

This chapter comprises the discussion which gives the detailed information of interaction of the findings of current study with the literature, the conclusion which summarizes the whole research process, and the future recommendations which provide the key points for future research in this area.

C. Discussion

This study adds to the understanding of citizenship behavior and job satisfaction with respect to the physiotherapists. The results showed that physiotherapists were satisfied from their jobs but their frequency of exhibition of OCB was averaged. But in correlational analysis, organizational citizenship behavior showed positively signified relationship with job satisfaction among physiotherapists, which denoted that specificity of this association on physiotherapists as compared to early studies which mostly focus on industrial, hotel, nurses, and other service sector workers as sample. So, the first hypothesis was supported. This result showed the expected connection with other studies which also showed positive

and significant relationship between organizational citizenship behavior and job satisfaction (Günay, 2018; Mushtaq & Umar, 2015). In the same way, Narzary and Palo (2020) also gave an evidenced to confirm the relationship between organizational citizenship behavior and job satisfaction, as well as, same relationship confirmed on the bank employees of India (Singh & Singh, 2019).

In the comparison results, postgraduates showed a little more job satisfaction as compared to graduates' physiotherapists but in t-test results job satisfaction did not show any statistically significant difference with the educational level of physiotherapists, which was not supported the hypothesis 2. In the same way, male showed a little more satisfaction as compared to female physiotherapists but in t-test results job satisfaction showed not statistically significant difference with the gender type of physiotherapists, which also not supported the hypothesis 3. These results were surprising, many studies showed the affect to these comparing variables, and results were not consistent with the literature. Gender was negatively correlated with job satisfaction. Educational level was also affected the job satisfaction as many studies gave an evidence like it. As the education level or degree increased the job satisfaction level also increased which have further predictor of work engagement as a mediated effect (Shetach & Marcus, 2015; Asgari, Mezginejad, & Taherpour, 2020; Ng, Choong, Kuar, Tan, & Teoh, 2019).

Further while comparing the organizational citizenship behavior with types of gender revealed the results that females exhibited more frequency of OCB as compared to males' physiotherapists as well as t-test results also showed statistically significant difference with gender type, which supported the hypothesis 4. This result also consistent with the studies which proposed that the females were more motivated for pro behavior and performed more citizenship behavior in organizations as compared

to male due to the affective nature and internalized concerns (Indarti, So-limun, Fernandes, & Hakim, 2017). In other study, females have higher performance than males which further helped to do more pro behavior in hospitals because of the pay, supervisor and leadership style affected them and most important is the organizational justice (Asgari, Mezgin-jad, & Taherpour, 2020). Another study also gave an evidence that females showed more performance when they have more social capital which also led them to exhibit more OCB as compared to males (Basu, Pradhan, & Tewari, 2017).

In comparison of OCB of physiotherapists with the level of education revealed the results that postgraduates exhibit more frequency of OCB as compared to graduates' physiotherapists but in t-test results showed that OCB was not statistically significant difference with the educational level of physiotherapists. So, the hypothesis 5 is not supported. Results of this comparison consistent with the studies which revealed that demographic factors like education of an employee showed not any impact on the exhibition of OCB and not a very strong predictor for OCB among the oil workers in Nigeria (Uzonwanne, 2014). But another study which gave a contrast evidence against our study results, declared that females who were highly devoted themselves to their performance in work also devoted themselves to OCBs in organization if used the terms of scholarly articles 'loyalty and helping behaviors'. Further, these women also make a balance in work and family life due to the proper education and organizational support system. As well as it does not matter with the positions or hierarchy of females and by nature, they also expected from others to contribute on OCBs (Crawley, Maher, & Blake-Beard, 2015).

D. Conclusion

The study was conducted with the aim to inspect the association among organizational citizenship behavior and job satisfaction among physiotherapists which performed their duties at the hospitals of Karachi, Pakistan. This ascertained and captured the data from physiotherapists against their level of job satisfaction and behavior of citizenship in their respective hospital. To fulfill this purpose, this research conducted using quantitative research strategy as research process. Simple random sampling used for the selection of respondents from the hospitals and almost 52 physiotherapists recruited for data collection. Public hospitals selected purposefully due to more rehab's services of physiotherapy and a greater number of physiotherapists in it as compared to private clinics of physiotherapists. As an instrument of data collection, tools of measuring organizational citizenship behavior and job satisfaction adopted from the other authors which is written in appendices and highlighted in bibliography. For analyzing data, SPSS 21.0 used to measure the association and difference between the variables. Results declared that OCB positively correlated with JS among physiotherapists. Findings indicated that the more the organizational citizenship behavior performed the more the job satisfaction level of physiotherapists and vice versa. Further, organizational citizenship behavior found statistically different in males and females' physiotherapists, males perform a less frequent behavior of citizenship behavior than females' physiotherapists but did not find any statistically difference in the educational level of physiotherapists. In same way, the level of job satisfaction did not find any statistical difference in males and females' and educational level of physiotherapists.

E. Recommendations

It is recommended that future research may be conducted with taking a great number of samples as physiotherapists. Also, increased the target population to spread this on private sector with respective approach of analysis. Due to limit of time and resources this study limited to specific hospitals. This study proposed the recommendations for the physiotherapy departments that some management reforms needed to increase the citizenship behavior among physiotherapists and highlighted the core issues which hindered them to behave pro with having high level of job satisfaction. Literature also contributed to give the suggestion of upgrading the leaders' qualities or skills for making the relation productive among coworkers for encouraging them to perform extra behavior.

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German Settlements and the Presence of German Communities in the South Caucasus

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ABSTRACT

The article takes a look at various aspects of the migration policy pursued by Russian czarism in the Caucasus with a focus on Azerbaijan, which resulted in significant changes in the ethnodemographic structure of the Caucasian region in the 19th and 20th centuries. The author investigates the migration of German ethnicities to the Caucasus and uses statistics to show the dynamics of the quantitative indicators of the German communities that formed in the region during the period under review and the special features of their resettlement and economic and socio-cultural life.

Keywords: *Germans, resettlement, South Caucasus, Azerbaijan, Russia, Soviet Union*

INTRODUCTION

Russian Empire began its colonization policy by resettling foreigners, especially Christians to the Caucasus. The resettlement policy was an in-

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tegral part of Russian imperialism and its power. The settlement of foreigners began with Germans including Russians and Armenians to North Azerbaijan as well as to South Caucasus. Russian Empire benefited from the settlers for both political and economic points. Population movement also was a part of Russia's Christianization policy. In this way, Russia attempted to settle loyal Christians for the importance of the preservation of security and safety in the newly acquired territories. Russian administration thought that the presence of Christians would influence the Muslims in a positive way, helping them acquire the needed qualities of servants, farmers, and workers.

The article mostly investigates the periods of German resettlements in 1817-1840, as well as from 1878-1914 years during Russian imperial rule and 1941-1953 years during Soviet regime in the South Caucasus. This time frame is mostly based on the active phases of the resettlement carried out by Russian Empire in the South Caucasus. According to those periods, the most affected ethnic groups involved in the Russian-Soviet resettlement policies were Azerbaijanis, Germans, Russians, and Armenians. Russian resettlement policy began with Germans in 1817 and it is very important for understanding the motives and evolution of Russian empire's approach to the settlement aims.

My aim in this article is to analyse the complexities of empire-building in the borderlands. Thus, the article will focus on differences in approaches carried by the Russian Empire and the Soviet Union, which subsequently affected their resettlement policies. The research also helps us to examine the imperial tools in the borderland, such as Christianization and its connection to resettlement practices, directed to the Russification of the indigenous people of the region. I argue that the resettlement policies were consistent throughout the Tsarist and Soviet administrations – the extension of imperial power in the borderland despite declared goals of econom-

ic development or religious refashioning of the region. Russia also tried to turn this region into an inalienable part of the empire. However, this pursuit was not only driven by a religious motive; it also helped to consolidate the Russian imperial power in the region. I believe that the resettlement and Christianization were part of population management which served other interests such as the empire-building process. The rationale for such design was primarily political – to have a loyal Christian population belt in the Muslim borderland to be used against Persia and the Ottoman Empire.

The life of German settlers in Azerbaijan has been thoroughly studied in the Azerbaijani literature but these are mostly ethnographic studies centering on their economic and cultural activities. This article heavily deals with Turkish and Russian sources.

Most of the Azerbaijani historians, including Khajar Verdiyeva in her study of the Russian resettlement policy, maintain that Russia carried out Christianization and Russification in the South Caucasus and that the resettlement was part of this policy.

I studied this topic, by using historical and analytical methods. This research contains an introduction with two sections: the first topic includes two sub-topics, and the second section includes three subtopics. The research shows its findings in the form of statements and recommendations.

How the resettlement of Germans began. The main causes and effects of the resettlement

After the Russia-Iran wars which were concluded by the Treaty of Gulistan (1813) and the Treaty of Turkhmenchay (1828), the Russian Empire acquired control of the South Caucasus and Northern Azerbaijan. The resettlement was the main priority in Russian imperial policy.

Thus, at the beginning of the 19th century, Germany was totally devastated

and destroyed by wars led by Napoleon. While the political and economic situation in the country got worse and worse, economic difficulties were the main reason accelerating Germans' migration. Furthermore, the sectarian and religious movement became active especially in the southern parts of the country. The first Caucasus German settlers departed from the city of Ulm in Württemberg in 1817, travelling in wooden boats along the Danube. German colonies resettlement started from 1816 and lasted until 1818. The first groups were moved to Tiflis in 1817, which was called Marienfeld near the village of Sarti-Chala by 31 families (170 people). In 1818 another five colonies were founded in Georgia (Katharinenfeld, Alexandersdorf, Petersdorf, Elisabeththal and New Tiflis).

Some of the followers of this movement wanted to move to the East, in particular to the Caucasus, which in their opinion, was "not too far from the cradle of the human race". (Smirnov. S 1865, 9) However, religious grounds played the main role in their exodus to the region. They believed that these soils were sacred, where Noah's ark dropped an anchor. Noah's ark has been long believed to be located in the region on the top of a mountain, either in eastern Turkey or in Azerbaijan's southwestern Nakchivan region. According to some researchers, the choice of Azerbaijan is due to the fact that they also perceived these lands as sacred, associated with Noy (the etymology of Nakhichevan is associated with Nukh chikhan). They were aware that Noah's ark remained in the Caucasus, therefore there were Christians who wanted to visit such a holy place.

According to some sources, sectarians appealed to Russian Emperor Alexander I, who passed through Stuttgart while attending the Congress of Vienna, asking him to allow them to settle in the Caucasus. (Basikhin. P. 1900,4) A chief advocate of the resettlement of Germans in the Caucasus was the commander in chief of the Caucasian Army general Ermolov. On December 31st in 1816 he sent a letter about the review of Germans

economic situation, in which he requested to send about 30 families to promote agriculture in the South Caucasus. The Russian Tsar promised to provide migrants with settlements and land, to exempt them from military service and taxes, and to ensure their religious freedom. Another main reason for the Germans movement, during Frederick III's rule, Lutheran Consistory (a spiritual one which has the right of administration and court) he applied new worship rules for the churches and made a resolution to stop them using old hymns and prayer books. This led to discontent among certain religious Germans. The "separatists" didn't want to recognize this resolution and left their motherland. Germany was not united at that time, the ordinary German people especially peasants were under oppression and had a very hard life.

By autumn of 1818, it reached 500 families in Azerbaijani and Georgian territories. The legal basis for the settlement of Germans in the Caucasus was a decree issued by the Committee of Ministers on 7 September 1818 "On the Settlement of Wurttemberg People in Georgia". Russian emperor Alexander I issued the above-mentioned decree after reviewing the tenets of sectarian beliefs of Germans.

The first two German colonies were established in the territory of Azerbaijan, Helenendorf was founded on the site of the destroyed site of the ancient village of Khanliqlar (now the city Goygol) and the second was named Annenfeld on the site of the ancient city Shamkir. At first about 127 families (approximately 600 people were resettled in Helenendorf, then 67 families (300-400 people). It was thought that new settlers could be a good model of craftsmanship, business, and in land-lording.

The Tsarist government spent large amounts of money on the implementation of the resettlement plan. Russian Emperor Aleksandr I ordered the allocation of 100,000 silver rubles from the state budget for the settlement of German immigrants, the state spent 697,428 silver rubles on the

provision of homes for Germans in Transcaucasia, and besides that, each German family was given a long-term loan of 3,000 rubles. The Russian Empire had high hopes for the German immigrants and provided Württemberg settlers in the Caucasus with all kinds of material support. For instance, financial assistance was given towards the construction of a church in Helenendorf. The new-settled Germans of the city were exempted from all service obligations for 10 years, and during that period, the Russian government spent 211,604 rubles and 98 kopecks on them. (Alizade. A. 2016, 220)

German resettlement in the South Caucasus took a longer adaption than was expected, granting fewer positive results for Russian Empire. German colonies in Azerbaijan also suffered by the II Iran-Russian war as well as colonists greatly suffered from different illnesses. Germans continued to move to the Caucasus in small numbers.

The next German inflow to South Caucasus began in 1840. But the following years it faded away as the Russian administration was disappointed with the result of the resettlement which showed little impact on local Muslims including the agricultural practices. The German unification in 1871 changed Russia's interest in Germans. Although by the beginning of 20th century the number of colonies reached to 8. Beside above-mentioned colonies more 6 colonies Georgesfeld, Aleksevka, Grunfeld, Eigenfeld, Traubenfeld and Yelizavetinka were located in Tovuz, Shamkir, Gazakh, Agstafa and Goygol regions of Azerbaijan. Besides that, in 1906, German colonists in Georgia set up the following settlements in our country: Grünenfeld colony (present-day Aghstafa district, Vurghun village); Eigenfeld (present-day Shamkir district, Irmashli village. The number of Germans especially increased in Baku after oil boom in the second half of the 19th and 20th centuries.

Deportation of the Germans

The culminating moment of Russian animosity against Germans was during I World War when Russian administration began to retitle all the names of the settlements. As Germany was the ally of the Ottoman Empire during the war, the very strict surveillance was introduced over German population. On 2 February 1915, the Council of Ministers adopted several laws to abolish the agriculture and land tenure held by Germans in the Russian empire, including those in the South Caucasus. The traditional institutions of state enforcement were set in motion. The Swabian Germans were continuously accused of betraying the interests of the Russian Empire. Rumors were again widespread about impending deportations. In the meantime, there were many very noisy demonstrations in St. Petersburg and Moscow, shops belonging to Germans were smashed. Reciprocal anti-Russian actions took place in Germany. Only during the independence of the Azerbaijan Democratic Republic from 1918 to 1920, the first major changes in property relationships occurred. The Transcaucasian German National Council was organized in Tbilisi and Lorenz Kuhn, the Swabian chairman, was an elected member of the National Council of the Republic of Azerbaijan. Representative of the German colonists Lorenz Kuhn in the ADR assembly in his opening speech stressed that Azerbaijanis and Germans have lived together for more than 100 years, “the most sincere good-neighbourly relations have never been broken; a life working for the welfare and prosperity of a free Azerbaijan.” In Tbilisi was published the first German newspaper, the *Kaukasisch Post* (Caucasian Post), intended for the regions of Georgia and Azerbaijan. Already in one century time the colonist-settlers improved their colonies, built schools, churches and establishments of vocational education and culture, and carried out educational and charitable work.

As in 1920 Azerbaijan was occupied by the Soviet Army and became after-

wards a Soviet republic, the new authorities started taking harsh measures against Germans as well as to other nationalities. This policy continued in the following decades against Germans and other ethnic groups. In the meantime, the NKVD (Ministry of Interior in the USSR) arrested some member of the German community charging them in anti-Soviet activities and exiling them to Siberia. Mainly they were Germans who were born in Germany and moved to the settlement during their lifetime. Apparently, the Soviet authorities were more suspicious of “new” German settlers, who they thought might have stronger linkages with the homeland. Although the Molotov- Ribbentrop Pact of 1939 eased the tension towards Germans, the Soviet state continued repression against Germans during II World War. As the war began Soviet administration took tough measures against Germans and deportation began. The Lutheran community resumed its activity in Baku only in 1944. (11)

The beginning of the Second World War marked the massive deportation of population based on their ethnicity. I want to mention that the deportation of Germans, however, was a logical continuation of the Soviet policy of the previous two decades. First of all, the Soviet state developed the concept of the “enemy of the people”, which initially targeted individuals: bourgeois, kulaks, counterrevolutionaries and others. Then it gradually expanded and simultaneously focused on foreign “spies” and “agents” as well as various nationalist movements. The prophylactic deportations in the pre-war period should be considered within the Soviet campaign against “non-reliable and harmful elements”. When the war broke out, the Soviet system (and people in terms of popular support) was ready to “grind” entire ethnic groups. This evolution occurred primarily under the influence of geopolitical factors rather than domestic ones. For the Soviets the primacy of the territorial hold of the borderland became acute and subdued other, even economic considerations; this once more underlines the imperial na-

ture of the USSR and puts this entity along with other empires. Archival sources point out that prior to the war, the Soviet NKVD kept close eyes on the life of German colonies in Azerbaijan. As early as November 1934 the republic's NKVD reported that anti-Soviet leaflets were distributed in the front of the local office of the Communist party of Helenendorf. (Helenendorf, as with other German settlements, was renamed during the First World War by the Tsarist authorities to the more Russified "Yelenino", and in 1938 to Khanlar – the name of an Azerbaijani communist. (12) NKVD advised the republican authorities that some German settlements hosted a considerable number of individuals with anti-Soviet "inclinations. (12)

So in 1941 on the 8th of October the State Defense Committee adopted resolution No. 744cc "On resettlement of Germans from the Georgian, Azerbaijani and Armenian SSR", Germans 23,580 from Azerbaijan SSR, 22,741 people from Armenian SSR and 212 people from Armenian SSR were resettled in the Kazakh SSR. It was carried out from 15 until 30 of October in 1941 (N. Bugai, 1998,8). Before that more than 20000 German colonists were living in Azerbaijan.

Germans deported from Azerbaijan from 15 to 30 October were moved to North Kazakhstan, Akmolinsk, Karaganda, Kustanai and Pavlodar regions of Kazakh SSR. Deported Germans were moved to special settlements, they were deprived of many rights, especially the right to change their place of residence. The use of German language was strictly forbidden, there was no opportunity to attend school and religious activities were banned. The men were separated from their families and sent to the gulag as "soldiers" of a "working army". By that time Nazi army had already reached the capital Moscow and there was a fear that Germans might support Adolf Hitler and his soldiers. Some Azerbaijanis, especially those who studied in Germany during the Musavat government in 1918-1920, were also arrested and charged as "spies" and as proponents of Azerbaijani

independence. In the 1940s some Germans tried to return to Azerbaijan but they were identified, arrested and deported again. Thus, the resettlement in the Soviet Union had strong linkages with the previous Tsarist traditions. This continuity is especially visible in two well-developed strategies: agricultural colonization and the resettlement of the non-loyal population.

Only on the basis of decrees of the Presidium of the Supreme Soviet of the USSR dated 13 December 1955, 29 August 1964 and 3 November 1972, were the Germans given the opportunity to leave these special settlements. However, they were finally rehabilitated on the basis of the Declaration of the Supreme Soviet of the USSR “On the Recognition of Repressive Acts against Forcibly Resettled Peoples as Illegal and Criminal and Ensuring Their Rights” signed on 14 November 1989 (V.A. Aumana, V. G. Chebotareva, 1993, 6).

Even after Stalin’s death, they were not allowed to return to the Caucasus. Many remained in the multinational “melting pot” that was then Soviet Kazakhstan. Some have moved south, attracted by the warmer climate similar to the Caucasus whose parents moved to Uzbekistan. Later, with the collapse of the USSR, a great wave of migration began - Russian-speaking Germans, including those from the Caucasus, began to flock to newly united Germany, to the homeland of their ancestors. This process continues to this day.

Below are the demographic changes among German colonists in Azerbaijan:

The number of Germans and their percentage in relation to the total population

1819	1600-0,28%
1916	15990-0,41%

1939	23133-0,7%
1989	748-0,01%

Now more than 700 Germans live in Azerbaijan, mainly in Baku. They created the cultural and historical society “Renaissance”, as well as the Evangelical Lutheran Community, the wineries created on the basis of the trading houses of the Forer and Hummel brothers and “Concordia” are still operating.

Germans in the Economic and Cultural Life

Germans had a great impact in all spheres in Azerbaijan's in cultural, religious and educational life.

There were also a lot of German capitalists among oil barons. German population was mostly engaged in agriculture, especially viticulture and winemaking too. Among big wineries were Hummel brothers and Forer brothers. At the same time cattle breeding, various kinds of crafts and dairy production were also very popular among German settlements. In a short period of time a lot of German specialists, teachers, engineers and entrepreneurs moved to Baku. Already in 1939 year 23,133 Germans lived in Azerbaijan. (A. Polyakova 1992, 3) It should be noted that the household of the Forer brothers developed rapidly and expanded every year. And if in 1846 Forer brothers laid the first tithe of the vineyard, then in 1895 there were 60 dessiatines under the vineyard, in 1901 - 164 dessiatines, and by 1907-1908 - about 300 dessiatines. Moreover, the farm owned land not only in the count Helenendorf, but also bought land outside - in Karaeri, Da-shalty, etc. in Elizavetpol district. (Zeynalova. S. 2002, 10). The famous electrical engineering concern Siemens in 1864-1865 built the Gadabay copper smelting plant in Azerbaijan, in 1883 - the second such plant and a railway. In the 60s of the 19th century, the concern mined cobalt in Dashkesan, and built the Bibi-Heybat and Belgorod power stations in Baku at the beginning of the 20th century. Benkendorf & Co Trading House was involved

in the oil industry of the Baku region. The colonists also produced grain, prunes, and dairy products for sale. But all these positive transformations were stopped after the April coup in 1920, and the German colonists of Azerbaijan entered a new period of trouble, directly after the establishment of Soviet power “The decree given on the transfer of wine-making and distillery enterprises, wine and alcohol cellars and warehouses to the Economic Council”, dated June 9 1920, was directed against the private property of the German colonists of Azerbaijan. In this situation, the well-known families of the colonies of Helenendorf and Annenfeld, trying to save their farms, decide to create a wine-growing cooperative and stop the process of destruction of the socio-economic structure in the colonies. For this purpose, on June 16, 1920, the Production Union of Labor Winegrowers - Winemakers, was formed, and after that it was renamed into the Concordia cooperative, which included the capital of famous colonists as well as a whole network of small German farms. In a short period of time, “Concordia”, during the years of the New Economic Policy (NEP), made a great success in the economic area. In the middle of the 20s of the XX century, having strengthened the economic foundations of the USSR, the administrative and power structures of the Soviet power began to localize, and also the liquidation of small-scale and medium-sized capital, as well as Concordia. At the beginning of 1925, the administrative and power structures of the Soviet government began to liquidate this cooperative. Thus, the strengthening and prosperity of “Concordia”, as well as its social layer - the Germans-colonists became dangerous for the socio-economic foundations of Soviet power. And the beginning stage of liquidation of the Concordia cooperative was the beginning of the end of the German pages of the history of Azerbaijan. Even in 1935 German collectives were even officially declared to be harmful. At the end of that year almost all Concordia’s high-level personnel were arrested.

Germans also played very important role in social, cultural and economic life of Azerbaijan as well as in the life of South Caucasus.

As we know, religion played a very crucial role in Russian colonization policy too. Protestant Germans preserved their religious traditions and customs. Missionary organizations were established in different parts of Azerbaijan. Russian empire was very interested in increasing of the missionary organizations and encouraged their activity in order to create consolidated ethnoconfessional basis to strengthen Christian element in the region. As a result of it, 1823 The Basel Evangelical Society was established in Shusha under the leadership of August Dietrich and Felician von Zarembo (ACAC, Vol.VI, Part I, 2).

As the local population was mostly Muslims this missionary society could not spread Christianity among them and meet with the resistance of the locals. As it was not successful was abolished in 1837. Germans were the main representatives of Protestantism. German migrant settlers were granted with the freedom of confession and they also had opportunity to build churches in Azerbaijan as well as in other parts of South Caucasus. Numbers of clergymen and pastors were invited to serve them. Then in 1827 Russia instituted the position of ober-pastor (supreme pastor) in the South Caucasus. In 1841, at the Synod held in Helenendorf, the first ecclesiastical charter was adopted for all German communities of the Central Caucasia, and the pastor was Christoph Heinrich Bonwich (1804-1876). It should be noted that the Ober-Pastor was appointed by the Ministry of Internal Affairs, in agreement with the Chief Commander of Civil Affairs in the Caucasus. (H.Verdiyeva. 2009, 7) In 1841 the general charter of Evangelical Lutheran Church was applied to them. So generally German colonists were defined by confession as Lutherans.

As being the part of educational, cultural and spiritual life of South Caucasus, the first German school was founded in Helenendorf in 1842. Even

during 1924-1926 years German settlements and in Baku, in all Azerbaijan, there were eight German schools with the number of 1,090 students and one German school of the second stage in Helenendorf with 213 students, with a total of 69 teachers. Azerbaijani, German, and Russian teachers - V. I. Hummel, O. I. Vuhner, M. Ibrahimli, E. Tselinskiy, G. I. Olkhovskiy and others – taught at those schools. In Helenendorf was a “Women’s Benevolent Society”, whose members were German women who were involved in charitable activities and helped many people in need. As you can see, Germans were involved in social and cultural life too.

These events were of great importance in the cultural life of the colonies of Azerbaijan.

After settling down the first thing was to build a God house for themselves. The first prayer house was built in Helenendorf. One of the first teachers was Jacob Kraus. The German community founded the first Lutheran church in Azerbaijan in 1854, the first stone of the church was laid in Helenendorf (Goygol), which was opened in 1857. The church was closed in 1941 after the deportation of the Germans from the region. At different times but was used as a military hospital and a sports school. Since 2005, it is functioning as a museum of history and ethnography of the region. The church was renovated in 2008. Now the town of Goygol is like a little piece of Germany.



Lutheran-church-in-Azerbaijan-Goygol.

In 1909 the foundation of a church in Annenfeld (Shamkir). Both of the above-mentioned churches were built in Roman-Gothic styles were distinguished by simplicity. Historical studies confirm that since the middle of the XIX century, more and more people of German and Swedish origin began to come to Baku. The oil boom in Baku has led to an influx of labour into the country from abroad. People of German and Swedish origin who settled in Baku at that time decided to build church here for worship.

In early March 1894, a young talented architect Adolf Eichler, inspired by the Church of St. Elizabeth in Marburg, presented the draft church for approval by the community meeting, and in March 1896, a ceremonial laying of the building took place. When the Evangelical Lutheran Church in Baku was laid, the Baku governor and the mayor were present, and Emmanuel Nobel officially arrived to participate in this event. The church was built exclusively thank to donations from parishioners, including the “Nobel Brothers partnership”. A heavy, visible from afar, gilded cross weighing 213 kg was installed on the spire of the Erlöserkirche. At the beginning of 1899, church bells and organ were installed. The consecration ceremony, which brought together about a thousand spectators, took place on March 14, 1899. In 1900, an organ gets installed in the church and the first concert takes place. (11)

In Soviet times, the functioning of this church, as well as many centres for worship, was discontinued, in some cases, the building was in danger of demolition. In subsequent years, the building, renamed the chamber and organ music hall, was transferred to the Azerbaijan State Philharmonic by the decision of the Cabinet of Ministers. On the initiative of President Ilham Aliyev, in 2010 the building began overhaul and restoration. According to the order on repair and restoration of the chamber and organ music hall of the Azerbaijan State Philharmonic, funds were allocated in the amount of 1 million manats. The Evangelical Lutheran Church in Baku or Baku Church of the Saviour has been renovated by the Azerbaijani state. Azerbaijani specialists carried out the major reconstruction and overhaul works, by preserving the original style and the ancient historical architecture of the building. Special attention was paid to the acoustics of the building, which is one of the most beautiful examples of traditional German gothic architecture. Moreover, for the first time ever, a ventilation system has been installed in the building. The church currently operates as the Chamber and Organ Music Hall of the Azerbaijan State Philharmonic.

As F. Zimmer a teacher at the Helenendorf academy, points out; “The colonists are very strict in their observance of church rituals. They rarely miss church services and are disdainful of anyone who does not regularly attend church. As soon as the bell start ringing, all the family members head for church,’ (F. Zimmer, 1901, 5)

German inhabitants of South Caucasus were extremely involved in religion. They studied religious books from an early age and celebrated all religious holidays. Religion even was mandatory at German schools.

Evangelical-Lutheran Church in Baku

The First and Second World wars also had a very bad impact on the religious life of Germans. Before the beginning of the Second World War, all the Lutheran parishes had been left without any pastor. The church was separated from the state and from schools and religious classes were abolished in German schools. German teachers were fired. Anti-religious propaganda was carried out by numerous Soviet organizations. The Lutheran community in Baku ceased to exist in 1936 but the church was not destroyed while all other churches were shut down by 1937. Pastors were accused of so-called anti-Soviet activities as well as having connections with and receiving help from Germany. According to the archives of the NKVD, seven Lutheran pastors were arrested for espionage during the 1936-1938 period. Main target of Soviet law-enforcement measures were clerics and most of them were arrested. The priests of Lutheran church along with representatives of other religious communities were sent into exile and executed by shooting in 1937.

The situation today

As a multicultural and multi-religious country, Azerbaijan has always been home to representatives of all nations and religions, who have co-existed

and worked together peacefully for centuries; the state shows due care towards protecting, restoring, and rebuilding their cultural heritage. The large Christian community in our country is an integral and active part of our society, and their monuments and places of worship, churches are fully protected by the Azerbaijani state and are regularly restored. The President of the Republic of Azerbaijan signed on 30.08.2016, an Order on the 200th Anniversary of the establishment of German settlements in the South Caucasus. Based on the very Decree, the 200th Anniversary of the establishment of German settlements in the South Caucasus was widely celebrated in Azerbaijan and Germany, numerous events dedicated to this historic event were organized in Baku, Berlin and other cities. The German orientalists have provided important services in introducing magnificent cultural heritage of the Azerbaijani people to the world scientific community and German architects made valuable contributions to urban planning culture in Azerbaijan. It is commendable that various Azerbaijani cultural and art samples are kept in several German museums.

All monuments of the German heritage, Lutheran churches in Baku, as well as in Goy-gol and Shamkir are well preserved.

German Lutheran Church in Shamkir German Lutheran Church in Shamkir, Azerbaijan There is also The German-Azerbaijan Cultural Society Kapelhaus operates in Baku, where a lot of events, concerts, and exhibitions are held every year. All the architectural buildings built by German architects are well preserved. This is another example of tolerance, the policy of multiculturalism, the careful attitude to the historical past and culture of different ethnic communities' faiths residing in Azerbaijan.

CONCLUSION

Through our progress in this research, we can draw the following conclusions. Thus, it is clear that Russia's resettlement policy of different nations such as Germans, Armenians and Russians had various political and eco-

nomic purposes but ultimately overlapped with the desire to Christianize the region and to increase loyal inhabitants in the Muslim dominated frontier. Settlers were seen as a tool for imperial policy.

Above mentioned reasons led to separatism too. This article proves that the Russian resettlement policies emanated from similar geopolitical and security considerations in the South Caucasian borderland and were aimed at changing the demographic composition of the region.

Along with the above-mentioned facts the deportation of Germans shows that through the imperial looking glass there was no inherent reliable ethnic group due to its religious affiliation or other factors; the “merits” of ethnicity and co-religionism were tied to their empire-building qualities.

According to the above-mentioned facts, as we see, resettlement policy – coupled with Russian-Soviet administration – was one of the major factors causing the ethno-territorial conflict between Azerbaijanis and Armenians.

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Shaping Turkish Conservatism: *Aydınlar Ocağı* and the Turkish-Islamic Synthesis

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SUMMARY

The aim of the article is to reflect on the interaction between ethnic nationalism and Islamism in the formative phase of conservative Turkish thought in the second half of the 20th century. Particular attention will be paid to the role played by the intellectuals gathered in *Aydınlar Ocağı* (Intellectuals' Heart), a highly influential conservative think tank active since the early 1970s.

Keywords: *Turkish-Islamic Synthesis, Conservatism, Islamism, Nationalism*

A key moment in the history of Turkish political thought is represented by the spread of the Turkish-Islamic Synthesis (*Türk-İslam Sentezi*), which constituted the most organic and complete attempt to marry Turkish secular nationalism with Islam and exerted a decisive influence on the political and social evolution of Turkey. The Turkish-Islamic synthesis basically consists of a system of ideas, formulated in the second half of the 20th

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century, functional to the integration of nationalists and Islamists into a broader political identity of the Turkish right.

At the heart of this doctrine is a historiographical theory according to which the civilization of Turkey is the result of the synthesis between Islam and the national culture already present among the ancient Turks. An attempt was thus made to establish a link between the national state and the imperial past, re-evaluating the Seljuk and Ottoman heritage as an integral part of national identity. In this way, the foundations were laid to create a symbolic imaginary in which ethnic nationalists, Islamists and other conservatives could recognize themselves in equal measure.

An absolutely central role in these developments was played by *Aydınlar Ocağı* (Intellectuals' Hearth), a conservative think tank active since the early 1970s. The association counted among its ranks a large part of the Turkish conservative intellectual elite, both from nationalist and religious circles. The association's cultural and editorial initiatives were instrumental in establishing the ideological boundaries of the political right in Turkey. A considerable part of the ideologues of the Turkish state came from its ranks, especially in the period following the coup of 12 September 1980. For this reason, the influence of *Aydınlar Ocağı* went beyond the very borders of the conservative environment to mark the contemporary history of Turkey. In addition to tracing the events that led to the founding and development of the association, the aim of this essay is to reflect on the way in which nationalists and Islamists coexisted and interacted within *Aydınlar Ocağı*. To this end it will be necessary to analyze its composition and the cultural profile of its members. The Turkish-Islamic synthesis developed precisely as a response to the practical needs of this fruitful but somehow difficult coexistence.

1. *The origins: Aydınlar Kulübü (1961-1965)*

The *Aydınlar Ocağı* has played a role of undisputed importance in the evolution of Turkish political thought in the contemporary age. For this reason, its foundation in 1970 can legitimately be seen as a central step in the history of Turkey in the second half of the 20th century. However, it must be borne in mind that in that historical context the birth of a right-wing cultural association was not a revolutionary event or an absolute novelty. The origins of *Aydınlar Ocağı* must be sought in the previous decade, and contextualized in that political and cultural climate.

Among the various right-wing associations that arose between the 1950s and 1960s, the *Aydınlar Kulübü* (Intellectuals' Club) is worth mentioning. Founded in 1961 by a small group of conservative academics, it can be regarded as the predecessor of *Aydınlar Ocağı*².

The first president and main animator of *Aydınlar Kulübü* was Süleyman Yalçın (1926-2016), professor of medicine at the University of Istanbul³. Yalçın was a classic example of a right-wing intellectual born between the two world wars, who had reached adulthood during the crisis of the Kemalist regime and the transition to the multi-party system. During his cultural training, Yalçın had been influenced in equal measure by nationalism and Islamism. The son of a muezzin, he was born and raised in the rural and patriarchal context of a Thracian village. As a teenager, he made friends with the ultra-nationalist ideologue Nihal Atsız, his high school literature teacher⁴. Later he approached religious circles, bonding in a particular way to the Islamist author Necip Fazıl Kısakürek.

² Iulia Alexandra Oprea, *State-led Islamization: The Turkish-Islamic Synthesis*, in "Studia Universitatis 'Petru Maior'. Historia", Vol. I, 2014, p. 132.

³ Prof. Dr. Süleyman Yalçın vefat etti [Prof. Dr. Süleyman Yalçın passed away], in "Milliyet", December 18 2016.

⁴ Prof. Dr. Süleyman Yalçın ile... "Ne Yaptınız Siz, Kur'an'ı Süpürdünüz" [Prof. Dr. With Süleyman Yalçın... "What did you do, you swept the Quran"], in "Altınoluk Dergisi", n. 158, April 1999, p. 10.

According to Kısakürek⁵ and as confirmed by Yalçın⁶, it was Kısakürek who suggested the name of the association. The use of the term *aydın*, which literally means ‘enlightened’ was by no means accidental. This word spread in the twilight of the Ottoman Empire to indicate men of letters who referred to the European Enlightenment culture. *Aydın* as a Westernized intellectual was therefore opposed to the *münevver*, the traditional figure of the Islamic scholar⁷. In the 20th century the use of the term *entelektüel*, an evident cast of the French, over time was associated above all with left-wing authors who supported progressive demands. During the preparation of the association’s statute, the founders considered the possibility of using the term *münevver*, but on the advice of Kısakürek the *aydın* option prevailed, more reassuring for the secular ideology of the state and easier and more immediate to understand. By appropriating this word, the conservatives contributed to giving it a new meaning, very different from the original. In *Aydınlar Kulübü*, the term *aydın* is used as a label to identify oneself as ‘right-wing intellectual’ and differentiate from left-wing culture. Therefore it is no longer opposed to *münevver*, but rather to *entelektüel*⁸.

İsmail Dayı (1926-2008), a follower of the Islamist-nationalist philosopher Nurettin Topçu and future parliamentarian of ANAP, was chosen as the general secretary of the association. Two friends and close collaborators immediately appeared alongside Yalçın, who would share his political and intellectual experiences in the following decades: the psychiatrist and official of the ministry of health Ayhan Songar (1926-1997) and the linguist Faruk Kadri Timurtaş (1925-1983). Both were university professors

⁵ Necip Fazıl Kısakürek, *Rapor 3/4*, İstanbul, Büyük Doğu Yayınları, 2014.

⁶ Fatma Yurttaş Özcan, *Bir Aydın Hareketi Olarak Aydınlar Ocağı ve Türk Siyasetine Etkileri* [Intellectuals Hearth as an Intellectual Movement and Its Effects on Turkish Politics], unpublished Ph.D. thesis, Sakarya Üniversitesi, Sakarya 2011, p. 287.

⁷ Murat Belge, *Tarihi Gelişme Süreci İçinde Aydınlar* [Intellectuals in the Historical Development Process], in Murat Belge (ed.), *Cumhuriyet Dönemi Türkiye Ansiklopedisi*, Vol. 1, İstanbul, İletişim Yayınları, 1983, p.126.

⁸ Özcan, *Bir Aydın Hareketi...*, p. 84.

and were part of the Kısakürek circle⁹.

Even more interesting – and revealing the ideological orientation of *Aydınlar Kulübü* – is the presence of the brothers Necmettin and Kemalettin Erbakan. Absolute protagonist of Islamist politics in Turkey, the future premier Necmettin Erbakan was going to become one of the best known and most influential figures in Turkish political history.

The economist Sabahattin Zaim (1926-2007) is another figure destined to play an important role in Turkish cultural life in the following decades. Zaim was a Muslim of Turkish ethnicity originally from North Macedonia (then Yugoslavia) who had moved to Turkey as a boy with his family. He distinguished himself for a particularly brilliant academic career. His works on labour economics and on the relationship between Islam and modern economics would have allowed him to establish himself on the international scene. Zaim was one of those conservative intellectuals who thus managed to gain recognition far beyond the circles of the Turkish right. In 2010 a university in Istanbul was named after him.

Among the animators of *Aydınlar Kulübü* a lesser known, but not negligible name is that of Asım Taşer (1923-2016), very active in religious and nationalist cultural circles since the 1950s. A pupil of Topçu – who had been his philosophy professor in high school¹⁰ – Taşer helped establish a very strong network of personal contacts between the exponents of the conservative right in Turkey.

Aydınlar Kulübü met in a rented premises in the Çarşıkapı district of Istanbul¹¹. The association's activities mainly consisted of organizing meet-

⁹ Umut Uzer, *An Intellectual History of Turkish Nationalism*, Salt Lake City, University of Utah Press, 2016, p. 180.

¹⁰ Mehmet Erken, *Kelimenin tam anlamıyla bir vakıf insanı: Asım Taşer* [Literally a foundation person: Asım Taşer], in “Dünya Bizim”, December 9 2015.

¹¹ A. Tan/Ö. Çakkal, *Prof. Dr. Süleyman Yalçın: Devrin Edebiyatçıları Önce Öğretmenlerim, Sonra Hastalarım Oldu* [Prof. Dr. Süleyman Yalçın: The Writers of the Age First Became

ings, conferences, lectures and debates on various cultural and political issues. The leaders of *Aydınlar Kulübü* managed to involve some of the most important figures of the conservative cultural world in their initiatives, such as the aforementioned Kısakürek and Topçu, or the jurist and former parliamentarian of the DP Ali Fuat Başgil¹². Among the speakers at the conferences and debates, there was no shortage of figures linked to ethnic nationalism, such as Nihal Atsız or İsmail Hami Danişmend.

In general, however, it must be admitted that the original group of *Aydınlar Kulübü* was more religiously oriented than strictly nationalist. If one imagines the political culture of the Turkish right as a spectrum between two extreme poles, represented respectively by ethnic nationalism and Islamism, the founders of *Aydınlar Kulübü* almost always placed themselves closer to the Islamist pole. The influence of Kısakürek and the presence of the Erbakan brothers leave little doubt about it. However, the internal composition of the group would undergo a certain transformation in a nationalist sense in the following years.

In 1965, Yalçın had to move to the United States for work and study reasons, and was therefore forced to temporarily abandon his engagement with *Aydınlar Kulübü*. Secretary İsmail Dayı was also forced to leave the group's activities to do military service. The sources do not agree on what happened at that point in the association. According to one version, Yalçın and Dayı were replaced by Zaim and Taşer in their respective functions as president and secretary¹³. Elsewhere, it is argued that *Aydınlar Kulübü* was closed with the departure of Yalçın¹⁴. Regardless of whether it was official-

My Teachers, Then My Patients], in "Sağlık Düşüncesi ve Tıp Kültürü Dergisi", n. 22, spring 2012, p. 98.

¹² *Ibid.*

¹³ İlhan Egemen Darendelioğlu, *Türkiye'de Milliyetçilik Hareketleri* [Nationalist Movements in Turkey], İstanbul, Toker Yayınları, 1968, p. 336.

¹⁴ Çiler Dursun, *Türk-İslam İdeolojisi ve Öznesi* [Turkish-Islamic Ideology and Its Subject], in "Doğu Batı", n. 25, november-december-january 2003/2004, p. 61; Sema Basmacı,

ly closed or not, it is still evident that starting from 1965 the activities of the association underwent a sharp downsizing if not a total cessation.

2. İbrahim Kafesoğlu and the Turkish-Islamic Synthesis

The second half of the 1960s was a time of great ferment for the right-wing culture, in which the foundations were laid for the creation of the *Aydınlar Ocağı* and for the formulation of the Turkish-Islamic Synthesis. Nationalist circles were experiencing a moment of great dynamism. In those years many congresses were organized, in which the exponents of different groups and different currents could meet to compare their ideas and develop common strategies. Among these congresses and seminars organized by the nationalists, two major events stand out in particular, which contributed significantly to shaping the conservative right in the following decades. The first Great Meeting of the Nationalists (*I. Milliyetçiler Büyük Kurultayı*) was organized between February 10th and 11th 1967, followed by the more formal and academic *Milliyetçiler İlmî Semineri* (Scientific Seminar of Nationalists) on May 9-10, 1969. These seminars, in which intellectuals from different groups (including *Aydınlar Kulübü*¹⁵) participated, helped to reformulate Turkish radical nationalism on a cultural basis. They therefore distanced themselves from the ethnic – if not openly racist – conception that had characterized the thought of the Turanist far right in the 1930s and 1940s, that was animated by personalities such as Nihal Atsız and Reha Oğuz Türkkan. In this new cultural version of radical nationalism, Islam – ignored or underestimated by the radical nationalists of the previous generation – was given significant weight as an essential component of Turkish identity. This constituted a further incentive for the

Aydınlar Ocağı ve Türk-İslam Sentezi: 1980'lerden 2000'li Yıllara Devreden Milliyetçi-Muhafazakar Bakiye [Intellectuals' Hearth and the Turkish-Islamic Synthesis: The Nationalist-Conservative Balance Carried over from the 1980s to the 2000s], unpublished MA thesis, Hacettepe Üniversitesi, Ankara 2009 p. 17.

¹⁵Özcan, *Bir Aydın Hareketi...*, p. 90.

ideological and political rapprochement, which has already been going on for some time, between ethnic nationalists and Islamists. However, it should be borne in mind that this process would never have produced a total merger between the two groups.

A central figure in this process of transformation of nationalist thought was the medievalist historian İbrahim Kafesoğlu (1914-1984), president of the *Kurultay* of 1967 and one of the promoters of the seminary of 1969. A war orphan from a village in the Aegean region, Kafesoğlu was trained at the University of Ankara under the prestigious guidance of the great historian Fuad Köprülü. Among his teachers and mentors were the Bashkir folklorist Abdülkadir İnan and the Hungarian Turkologist László Rásonyi¹⁶. The profiles of these two characters can be interesting for understanding the cultural and ideological environment in which Kafesoğlu was formed and to which he referred. Both were in fact supporters of Pan-Turkic and Turanist ideas, and İnan had contributed to the far-right publications directed by Atsız and Türkkan¹⁷. After completing his studies, between 1943 and 1944 Kafesoğlu was sent to Hungary to carry out a doctorate on the culture and history of the peoples of the steppe in Antiquity and in the Middle Ages. However, the devastating development of the war in Hungary led to the cancellation of his scholarship and forced him to return to Turkey. After returning to his homeland, Kafesoğlu's career developed mainly at the University of Istanbul, where he obtained his doctorate in 1949 and the qualification to teach in 1952. Following a brief experience in Erzurum, in 1962 Kafesoğlu was definitively incardinated as professor at the faculty of literature in Istanbul. Here he found himself collaborating closely with Zeki Velidi Togan, one of the historical leaders of pan-Turkic nationalism

¹⁶ Abdülkadir Donuk, *Prof. Dr. İbrahim Kafesoğlu'nun Hayatı ve Eserleri* [The Life and Works of Prof. Dr. İbrahim Kafesoğlu], in "Tarih Enstitüsü Dergisi", n. 13, 1987, p. 2.

¹⁷ Jacob M. Landau, *Pan-Turkism. From Irredentism to Cooperation*, Hong Kong, Hurst & Company, 1995, pp. 90-91.

and one of the greatest scholars of Turkic medieval history. Upon Togan's death in 1970, Kafesoğlu would inherit his role as full professor of Turkic history at the Istanbul University¹⁸.

The research undertaken by Kafesoğlu between the mid-1940s and the 1960s (with a particular focus on the ancient Central Asian Turks and the Seljuks) led him to develop a personal interpretation of Turkish history. At the origin of Kafesoğlu's thought there was the idea of a substantial continuity between the different eras of Turkic history. This was made possible above all by the affinity between the ancestral culture of the peoples of the Eurasian steppe and the religious morality they adopted after their conversion to Islam. On this basis, a definition of national identity could therefore be formulated giving equal importance to Turkic ethnic origins on the one hand and the contribution of Islam on the other. Kafesoğlu's theories – further refined during the 1970s – are the basis of the ideology of the Turkish-Islamic Synthesis, and have therefore had a tremendous impact on the developments of political culture in Turkey. Kafesoğlu's identity proposal was a solid core around which to build a broader convergence of views between the various conservative groups of nationalist or religious inspiration.

The themes that converged in the doctrine of the Turkish-Islamic Synthesis did not suddenly burst into the 70s, but slowly emerged through a long process of revision of national historiography. In the context of the Cold War and the growing climate of ideological clash between right and left, an interpretation of Turkish history began to spread in Turkish conservative circles as a polemical alternative to Kemalist historiography. This alternative historiography was heavily indebted to the work of influential historians such as Togan and Köprülü. Conservative authors such as

¹⁸ Donuk, *Prof. Dr. İbrahim Kafesoğlu'nun...*, p. 3.

Nurettin Topçu¹⁹ and İsmail Hami Danişmend helped extend the debate beyond academic circles.

Nevertheless, Kafesoğlu is almost universally credited as the creator of the Turkish-Islamic Synthesis, which to a certain extent actually corresponds to the truth. If the central themes of the Synthesis had already emerged in the alternative historiography of the previous twenty years, it is Kafesoğlu who coined the expression *Türk-İslam Sentezi*, used for the first time during a conference in 1972²⁰. In his work, the conservative interpretation of national history found the coherence and systematicity of a real historiographic paradigm alternative to the Kemalist one.

The central pillar of Kafesoğlu's interpretation of Turkic history is the continuity between the pre-Islamic period and the one following the conversion. Before knowing Islam and accepting it as a national religion, the society of the ancient Turks was already structured on values that coincide with Islamic ones: sense of justice, monotheism, faith in the immortality of the soul, the sacredness of the family, social solidarity. Therefore the conversion to Islam did not constitute an element of rupture such as to alter and 'pollute' the Turkish identity, as the suspicious attitude towards this religion on the part of the ethno-nationalists linked to Nihal Atsız's circle seemed to suggest. At the same time from Kafesoğlu's perspective it is not even possible to say that Turkish identity originates from Islam, as the Islamists argued. Islamization does not create the Turkish identity, which pre-exists it, but strengthens it and makes it more authentic and coherent. It can be said that with the conversion to Islam the Turks confirmed and crystallized their own Turkishness.

¹⁹ Michelangelo Guida, *Nurettin Topçu: The Reinvention of Islamism in Republican Turkey*, in «Alternatives. Turkish Journal of International Relations», Vol. 12, n.2, Summer 2013; Michelangelo Guida, *Nurettin Topçu and Necip Fazıl Kısakürek: stories of 'conversion' and activism in Republican Turkey*, in "Journal for Islamic Studies", vol. 34, n. 1, 2014.

²⁰ Oprea, *State-led Islamization...*, p. 133.

At the same time, while the conversion to Islam marked a fundamental moment in Turkish history, Kafesoğlu underlines that also the entry of the Turks into the Muslim world was a decisive event also for the fate of Islam and its historical destiny²¹. The Turks had found their religion in Islam, but Islam too had found its most faithful and authentic interpreters in the Turks.

Perhaps the most characteristic and original idea proposed by Kafesoğlu was also one of the most questionable: he argued that the Turks were already monotheists in the pre-Islamic age²². In this sense, Kafesoğlu distanced himself from the teaching of his teacher Fuad Köprülü, since he rejected the idea that animism and shamanic practices were characteristics of the original Turkish religion, but rather borrowings derived from the influence of the surrounding populations²³. This theory is difficult to sustain from a historical and factual point of view, but it responds to an ideological necessity that is functional to the conservative project.

Kafesoğlu's idea, according to which Islam came to confirm and strengthen the characteristics already present in Turkish ethnic identity – and by virtue of this the Turks were the most authentic interpreters of the Islamic religion – therefore played a decisive role in promoting co-optation of Islam as a central element of ethnic nationalism. Kafesoğlu was therefore driven by primarily ideological reasons to deny or to downplay the fractures in Turkish history, highlighting only the continuities. This led him to minimize or completely deny fractures, traumatic innovations, resistances,

²¹İbrahim Kafesoğlu, *Türkiye Bugünkü Şartlara Getiren Tarihi Gelişme – Ülkemizi 12 Eylül'e Getiren Sebepler ve Türkiye Üzerindeki Oyunlar* [The Historical Development That Brought Turkey to Today's Conditions - The Reasons That Brought our Country to September 12 and the Games played on Turkey], İstanbul, Aydınlar Ocağı Yayınları, 1984, p. 41.

²² İbrahim Kafesoğlu, *Türk Milli Kültürü* [Turkish National Culture], İstanbul, Boğaziçi Yayınları, 1993, pp. 295-301; İbrahim Kafesoğlu, *Türk-İslam Sentezi* [Turkish-Islamic Synthesis], İstanbul, Ötüken, 1999.

²³ Kafesoğlu, *Türk Milli Kültürü*, pp. 284-289.

compromises.

The transition from paganism to Islam is not the only historical fracture that needed to be healed: conservative thinking remained problematic in dealing with the Westernizing and secularizing reforms on which the Turkish national state was based. Kafesoğlu forced the hand of the sources at his disposal to provide very bold interpretations, in an attempt to highlight in medieval and pre-modern Turkish history characteristics that would have been typical of Kemalist Turkey. In his works it is argued that the Turks were the first people to have developed a national conscience, therefore the first and original nationalism would be the Turkish one – a belief that was already widespread in the Turanist circles. Kafesoğlu also attributed to the Seljuk Turks many of the innovations that would mark the transition from the Middle Ages to the modern age, in advance of Western Europe. He went so far as to affirm that humanism had roots in the Seljuk Turkic civilization and that therefore it was the Muslim Turks who laid the foundations for the Italian Renaissance and the start of European modernity. Kafesoğlu implicitly meant to suggest that Atatürk – like the reforming sultans before him – was fully in line and continuity with the Turkish-Islamic civilization of Anatolia. Claims that are too naive and bizarre for a professional historian of his experience and intellectual stature – such as the emblematic one according to which the secular state was a Seljuk creation – evidently underlie a very specific political agenda, which was intended to pacify Turkish conservatives with the secular republican state and co-opting Atatürk into the pantheon of Turkish-Islamic heroes²⁴.

The Turkish-Islamic Synthesis – presented by Kafesoğlu as a scientific and objective reconstruction of the origins of the civilization of Turkey – was actually part of a very specific political project, aimed at laying the foun-

²⁴ See Gary Leiser (ed.), *A History of the Seljuks: İbrahim Kafesoğlu's Interpretation and the Resulting Controversy*, in "Speculum 67", n. 1, January 1992, pp. 180-182.

dations for building a common vocabulary between ethnic nationalists and Islamists, and make it as compatible as possible with the republican state and with a strongly westernized society.

3. *The foundation of Aydınlar Ocağı (1970)*

At the end of the 1960s great developments also took place from external or opposing political and social forces with respect to religious and nationalist circles. The transformations in Turkey's conservative right were largely characterized by the reaction to what was perceived as a dangerous cultural hegemony of the left. According to Süleyman Yalçın²⁵, the founding of *Aydınlar Ocağı* was a response to the turmoil of 1968 and the spread of the student movement in Turkey. In the nationalist congresses of 1967 and 1969 the foundations were therefore laid for the creation of a new association, in part heir to *Aydınlar Kulübü*, but in which exponents of other groups would also converge, including the *Kültür Ocağı*, the *Milliyetçiler Derneği* and the *Muallimler Birliği*.

Aydınlar Ocağı was founded in Istanbul on May 14, 1970. There were fifty-six founding members, including thirty-one academics. The remainder was made up of journalists, writers, teachers, and even some entrepreneurs and freelancers²⁶. Interesting and significant as there was not even a woman among the founders. İbrahim Kafesoğlu was elected as president.

Süleyman Yalçın loved to emphasize the continuity between the experience of *Aydınlar Kulübü* and the founding of *Aydınlar Ocağı*, almost as

²⁵ Mehmet Umur/Tanıl Bora, *Türk-İslam 'Masonları'* [Turkish-Islamic 'Freemasons'], in "Yeni Gündem", February 22-28 1987, p. 11.

²⁶ Mustafa Özcanbaz, *Çağdaş Türk Düşünce Tarihinin Oluşumunda Aydınlar Ocağı'nın Yeri* [The Place of Intellectuals Association in the Formation of Contemporary Turkish Intellectual History], unpublished master's thesis, Hitit Üniversitesi, 2013, pp. 201-205.

if it were the same organization that had changed its name²⁷. In reality, things are not that simple and the transition between the two associations does not seem to be as direct and natural as Yalçın intended to make it appear. The main difference is that in 1970 the weight of the properly nationalist component had greatly increased compared to the substantially Islamist character of the old association. This emerges quite clearly from a brief examination of the intellectual biographies of the founding members, starting with President Kafesoğlu. Among the animators of *Aydınlar Kulübü*, the Erbakan brothers and Taşer were no longer present in the new association. On the other hand, several exponents with a decidedly ethnic nationalist profile took over, generally linked to Kafesoğlu and often admirers and disciples of Nihal Atsız.

A very clear example of this category is represented by Altan Deliorman (1935-2012). A scholar of the culture and mythology of the ancient Turks and contemporary Turkish history, he was born in Sofia to parents belonging to the Turkish minority of Bulgaria. He was ideologically trained in ultra-nationalist circles, and throughout his life he regularly contributed to the Turanist press and journalism. He was a pupil and follower of Atsız, who had been his high school teacher, and to whom he dedicated two monographs. He was among the creators and the first organizers of *3 Mayıs Türkçülük Günü* (May 3, the day of Turkism), an annual event in which ultra-nationalists still commemorate the anniversary of the 1944 trial against Atsız and the other exponents of the Turanist far right. Deliorman was also an assistant, friend and very close collaborator of Kafesoğlu.

Kafesoğlu's pupil and collaborator was also Mustafa Kafalı (b. 1934). Medieval historian and university professor, he mainly dealt with pre-Ottoman Anatolia and the Tatar civilization of the Golden Horde. Like other members of *Aydınlar Ocağı*, Kafalı was a great admirer of Atsız.

²⁷ Tan/Çakkal, *Prof. Dr. Süleyman Yalçın...*, p. 98.

Another prominent figure of ethnic nationalism involved in the founding of *Aydınlar Ocağı* is that of the linguist Necmettin Hacıeminoğlu (1932-1996). Deeply involved in the Turanist circles, he too was an admirer of Atsız. Among the members of the association, he was distinguished by his proximity to Alparslan Türkeş's MHP, contributing with his articles to the party's publications²⁸.

Muharrem Ergin (1923-1995), perhaps the figure with the greatest media exposure in *Aydınlar Ocağı*²⁹, also had a past linked to nationalist circles. Belonging to the Turkish minority of Georgia, he had emigrated to Turkey at a young age along with his family. As a boy he had been a pupil of Nejdîet Sançar, brother of Nihal Atsız and also an important ideologue of the ethno-nationalist right. At the trial of 1944 he had appeared as a witness in favor of the accused³⁰. Trained as a linguist, Ergin established himself as a university lecturer and scholar of Turkish literature. He wrote some very popular Turkish language manuals, both for high school and university courses. In the 1970s and 1980s he would have distinguished himself as one of the major ideologues of the Turkish-Islamic Synthesis.

Perhaps the most sensational manifestation of the link between *Aydınlar Ocağı* and ultra-nationalist circles is the very active membership of Reha Oğuz Türkkan³¹, who was, together with Nihal Atsız, the most radical exponent of Turanism between the two world wars. The massive presence of intellectuals who referred to ethnic nationalism – some examples of which have been provided – does not mean that all members of the association adhered to this ideology. First of all, it should be remembered that most of the 'old guard' closer to religious positions and largely linked to Kısakürek

²⁸ Landau, *Pan-Turkism...*, p. 169.

²⁹ Umit Kurt, *The Doctrine of "Turkish-Islamic Synthesis" as Official Ideology of the September 12 and the "Intellectuals' Hearth-Aydınlar Ocağı" as the Ideological Apparatus of the State*, in "European Journal of Economic and Political Studies", n. 2, 2010, p. 114.

³⁰ Uzer, *An Intellectual History...*, p. 160.

³¹ Altan Deliorman, *Uzun Bir Ömür* [A Long Life], in "Orkun", n. 169, March 2012.

remained within the association (Yalçın, Songar, Timurtaş...). In addition, other personalities of the same orientation joined the new association for the first time.

Among the founders of *Aydınlar Ocağı* there were also intellectuals born at the beginning of the century, thus belonging to the generation preceding that of the majority of the other members. They were peers of the ‘masters’ such as Atsız and Kısakürek, and at that time they could already be considered historical figures of the Turkish conservative world.

One of the most prestigious names was certainly the famous sociologist Ziyaeddin Fahri Fındıkoğlu (1901-1974). A true cornerstone of conservative culture in Turkey, Fındıkoğlu is to be considered among the most important social scientists in his country, and at the same time a ‘godfather’ of the conservative right in the political sphere. Between 1930 and 1935 Fındıkoğlu had completed his doctorate at the University of Strasbourg³², where he was fascinated by the thought of conservative intellectuals such as the sociologist Frédéric Le Play. In the years he had spent in France he had also been profoundly influenced by the ideology of the French right and in particular by *Action Française* and his ideologue Charles Maurras. When he returned to Turkey and became a professor at the University of Istanbul, he worked hard to «support this ideology [...] with the attitude of a missionary»³³. While he could not be classified as either an ethnic nationalist or an Islamist, Fındıkoğlu was politically close to both groups and often involved in their initiatives. In 1944 he had spoken publicly in defense of the defendants in the trial against Turanists³⁴.

³²Mustafa E. Erkal, *Fındıkoğlu, Ziyaeddin Fahri (1901-1974)*, in “İslâm Ansiklopedisi”, vol. 13, p. 28.

³³Aykut Kansu, *Ziyaeddin Fahri Fındıkoğlu, ‘Sosyal Mesele’ ve ‘İçtimai Siyaset’* [Ziyaeddin Fahri Fındıkoğlu, ‘Social Issue’ and ‘Social Politics’], in Ahmet Çiğdem (ed.), *Modern Türkiye’de Siyasî Düşünce. Cilt 5. Muhafazakârlık*, Istanbul, İletişim, 2006, p. 119-120

³⁴Uzer, *An Intellectual History...*, p. 153.

Belonging to the same generation were the art historian Ekrem Hakkı Ayverdi (1899-1984) and the writer Nihad Sami Banarlı (1907-1974), both followers of the great poet Yahya Kemal Beyatlı. Inspired by their teacher, they were supporters of a romantic and intellectual conservatism, profoundly influenced by the thought of authors such as Henry Bergson and imbued with the themes of spiritualism and existentialism.

In *Aydınlar Ocağı*, personalities of different ideological orientations and also from different generations had converged, however, who identified themselves in a common culturally conservative and politically right-oriented identity. This awareness was the mature fruit of a process of convergence that had begun at least two decades earlier.

4. Political factionalism and cultural hegemony (1970-2000)

Kafesoğlu formally abandoned the association's presidency in 1974, while continuing to be its main ideologue and leading figure. Süleyman Yalçın replaced him, thus returning to the role he had already covered in *Aydınlar Kulübü*.

In 1979, Salih Tuğ (b. 1930), a university lecturer and scholar of the history of law, was elected president. At the beginning of his academic career, Tuğ had been under the guidance and protection of pan-Turkist Zeki Velidi Togan³⁵. Later he specialized in particular on the history of Islamic law. He was one of those figures with a background and an intellectual profile that brought together nationalist and religious elements. In 1982 Ayhan Songar took over as president of the association.

For the ideologues of *Aydınlar Ocağı*, the Turkish-Islamic Synthesis was not only a description of the origins of Turkish civilization, nor was it

³⁵ Mustafa Uzun, *Prof. Dr. Salih Tuğ*, in "İslam Hukuku Araştırmaları Dergisi", n. 12, 2008, pp. 11-18.

a mere interpretative scheme of national history. It also had a prescriptive character with respect to the way of dealing with the issues of the present and the future. In the interpretation of Turkish history proposed by Kafesoğlu, a harmonious and efficient society would develop from the synthesis between Islam and the civilization of the ancient Turks, which revolved around the three symbolic spaces of the home, the mosque and the barracks. It was also to be a model for contemporary Turkey.

The problems of modern civilization, according to the members of *Aydınlar Ocağı* and the majority of conservative intellectuals, stemmed from the dominant materialistic mentality in social relations, a consequence in the first place of the spread of Enlightenment universalism and positivism. The blame for these developments in Turkey was largely attributed to the wrong and superficial approach of the 19th century reformers of the Ottoman Empire, who had passively imported Western models without delving into their philosophical and ethical aspects, and had at the same time caused the decline of morality and of local religious values. The solution to Turkey's problems was therefore identified in the return to the Turkish-Islamic synthesis which stood at the origins of Turkish civilization. Nationalism and religion were to provide the cement with which to rebuild a harmonious and supportive society, where authentic moral values would triumph over materialism.

If all the developments of the Enlightenment and positivist philosophical culture were in the dock as responsible for the decline of Turkish civilization, there is no doubt that the conservatives identified Marxism as the main enemy. All socialist thought – identified as such with anarchy and communism – was represented in a caricatured form as a sort of oncological disease that would lead with its metastases to the destruction of all ethical values and national culture.

The members of *Aydınlar Ocağı*, despite having no formal connection with any party, were strongly active in politics during the 1970s. Their action was cloaked in the desire to make an academic and scientific contribution to the public debate, but in fact, it resulted in a very violent ideological crusade against the left – not only the radicals but also Ecevit's CHP.

Ahmet Kabaklı, a member of *Aydınlar Ocağı* and one of the most important voices of the conservative intellectual world, used the confrontation between the Ottomans and Tamerlane as an example of the clash of identities and values between the right and the left in modern Turkey. On the one hand, the Ottomans represented the right: a force carrying order and culture, oriented towards moral purposes, aimed at building and not destroying. On the other hand, «The left is always Tamerlane. Therefore looting, corruption, lack of culture, vandalism, bullying, theft»³⁶. History teaches that Sultan Beyazıt – nicknamed *Yıldırım* (Thunderbolt) – was defeated by Tamerlane in the battle of Ankara in 1402. However, the victory of the Tamerlane hordes was only momentary, since the Ottoman state had survived and grew to become the greatest power in the world, while Tamerlane's ephemeral empire disintegrated completely in a few generations. The cultural and spiritual values and foundations upon which the state was built were worth far more than the outcome of a single battle. Indeed, the defeat of Ankara was providential because «if Tamerlane had not come, the sons of [Beyazıt] Yıldırım would not have woken up and would not have taken control of their country»³⁷. The comparison is clear: in the same way the 'red horde', which was crashing down on Turkey in the 1970s, had achieved only partial victories, which would have led to the rebirth and definitive triumph of nationalism and traditional values.

³⁶ Ahmet Kabaklı, *Devlet Felsefemiz* [Our State Philosophy], Istanbul, Türk Edebiyat Vakfı Yayınları, 2003, p. 37.

³⁷ *Ibid.*

Turkish conservatives often loved to portray themselves as the last line of resistance against the power of the ‘anti-national’ left in society and especially in the world of culture. In a country like Turkey in the 1970s it was unrealistic to talk about a hegemony of the left, but exaggerating the importance and destructive force of one’s opponent was a winning strategy because it compacted the conservative forces of society in the idea of having to unite for to perform a heroic deed in the name of the nation and of the Islamic religion.

Muharrem Ergin, the most active member on the public scene and in some respects considered the ‘political spokesperson’ of *Aydınlar Ocağı*, wrote many articles in support of the formation of the Nationalist Front on the pages of *Ortadoğu* (Middle East), the reference newspaper of MHP. Between December 5th and 8th 1974, *Ortadoğu* published a series of four editorials signed by Ergin in which nationalists and conservatives were invited to unite to save the country from the danger of communism, the cultural revolution and the harmful policies of Ecevit³⁸. The contribution of Ergin – and other conservative intellectuals linked to *Aydınlar Ocağı* – played a role in inspiring and providing an ideological framework for the formation of the first Nationalist Front government in March 1975. The articles published by Ergin on *Ortadoğu* between 1974 and 1975 in support of the Nationalist Front were later collected in the volume with the eloquent title *Milliyetçiler Kormayınız Birlişeniz* (Nationalists do not be afraid, unite).

With the advent of the Nationalist Front, the members of *Aydınlar Ocağı* achieved their first successes in the project to be accredited as ideologues of the government and the state. In 1975 Nevzat Yalçıntaş (1933-2016) – political scientist and future president of *Aydınlar Ocağı* – was appointed

³⁸ Muharrem Ergin, *Milliyetçiler Kormayınız Birlişeniz* [Nationalists Do Not Be Afraid, Unite], Ankara, Ekonomik ve Sosyal Yayınları, 1976, pp. 187-205.

general manager of the public broadcaster TRT. A high school textbook written by Kafesoğlu and Deliorman was published in 1976 and adopted by many schools across the country³⁹. The experiment of the Nationalist Front was doomed to fail, in a country in economic crisis and now hostage to political violence between radical left and right groups, but the events would have further favored the rise of the conservative intelligentsia.

The coup of 12 September 1980 marked the culmination of the most difficult period in all of Turkish history, but also the heyday of *Aydınlar Ocağı*. Military junta turned the Turkish-Islamic Synthesis into a sort of state ideology, and in the 1980s the members of the association reached prominent positions in politics and bureaucracy. It was precisely the exponents of *Aydınlar Ocağı* who benefited most from the new course inaugurated with the coup, forming the core of what has been defined as «the ideological apparatus of the state»⁴⁰. Süleyman Yalçın and Salih Tuğ – two of the leaders of the association – were the authors of a proposed constitutional charter that was submitted to the attention of the National Security Council⁴¹. It was noted that the final text of the constitution coincided 80% with the proposal of Yalçın and Tuğ⁴². Moreover, there were members of *Aydınlar Ocağı* within the same constitutional commission⁴³.

The main objective for conservative intellectuals was to gain control of the media apparatus and above all of the education system. The reform of the school system was a real obsession for conservatives, because they were convinced that the alleged ‘humanist’ hegemony within schools and

³⁹İbrahim Kafesoğlu/Altan Deliorman, *Tarih, Lise, I, II, III*, Ankara, Millî Eğitim Basımevi, 1976.

⁴⁰Kurt, *The Doctrine...*

⁴¹ Süleyman Yalçın, Salih Tuğ, *T. C. Anayasası İçin Teklif* [Proposal for the Constitution of the Republic of Turkey], İstanbul, Unal Matbaası, 1982.

⁴²Oprea, *State-led Islamization...*, p. 137.

⁴³ Binnur Toprak, *Religion as State Ideology in a Secular Setting: the Turkish-Islamic Synthesis*, in Malcolm Wagstaff (ed.), *Aspects of religion in secular Turkey*, Durham, Centre for Middle Eastern and Islamic Studies, 1990, p. 14.

universities lay at the root of many problems in Turkish society.

In this crusade to control public education, representatives of *Aydınlar Ocağı* were naturally in the front row. In 1981 Salih Tuğ wrote bluntly that the main reason for the crisis that Turkish society was going through was to be found in the ‘wrong education’ given in Turkish schools and universities. The 19th century reformers and above all the Kemalists had turned their backs on centuries of Islamic Ottoman civilization, rejecting and hiding a fundamental part of Turkish national culture from school curricula and university studies. This had pushed Turkey into a «new age of *cahiliye*» – the condition of ignorance and barbarism prior to the Islamic revelation – and created a vacuum of values in which radical and anti-national ideologies were inserted⁴⁴. A part of the Turkish youth, culturally uprooted and devoid of authentic spiritual and moral values, was thus attracted to Marxism and its insidious variants. For this reason, the ‘national culture’ had to return to being at the center of school programs and of the whole world that revolved around elementary and higher education.

In February 1982, the education ministry published a report – intended to lay down guidelines for the following years – which substantially reiterated what Tuğ and other conservative intellectuals argued. It explicitly claimed that Turkey was facing a ‘psychological war’ that had been waged against it by the enemies of the nation (Marxists, separatists, ‘provocateurs’ of various kinds...). It was recommended that nationalism and religious sentiment be brought back to the center of school programs and initiatives of the ministry of education, in order to counter these dangers that threatened public morality and national identity⁴⁵. The reintroduction

⁴⁴ Salih Tuğ, *Revivification of Islamic Teaching and Education in Turkey*, in “Al-Ittihad”, vol. 18, n. 1, pp. 10-22.

⁴⁵ Sam Kaplan, *Din-u Devlet All over Again? The Politics of Military Secularism and Religious Militarism in Turkey Following the 1980 Coup*, in “International Journal of Middle East Studies”, vol. 34, n. 1, 2002, p. 119.

of religious education in public schools is also part of this context, an element of clear discontinuity with the Kemalist ideology of the early Republican age. Also in 1982, a new subject called ‘Religious Culture and Moral Education’ (*Din Kültürü ve Ahlâk Bilgisi*) was in fact included among the compulsory courses in schools of all levels.

The influence of *Aydınlar Ocağı* in shaping the government’s ideological orientations did not diminish with the return to parliamentary politics. Turgut Özal – the undisputed protagonist of Turkish political life between the 1980s and the early 1990s – was also very close to *Aydınlar Ocağı*. It was during a conference organized by the association that he presented for the first time the ‘new vision’ (*yeni görüş*) that was the basis of his political and economic concepts⁴⁶. Alongside the policies of economic liberalization, the governments of Özal continued the conservative orientations in the world of culture and education along the lines dictated in principle by the members of *Aydınlar Ocağı*.

After a new interlude under the leadership of Yalçın, between 1988 and 1998 the presidency of *Aydınlar Ocağı* was occupied for an uninterrupted decade by Nevzat Yalçıntaş, that was not a founding member of the association. In the second half of the 1990s, *Aydınlar Ocağı* was somehow involved in the clash between the Islamist movement and the military and bureaucratic elites, losing the favor of the latter. Even the Turkish-Islamic Synthesis seemed momentarily in crisis, especially after the ‘postmodern coup’ of February 28, 1997 which established an ephemeral season of apparent progressive hegemony. In 1998, Yalçıntaş, disliked by the ruling class of the moment, left the presidency of *Aydınlar Ocağı*. In 2001 he

⁴⁶ Turgut Özal, *Kalkınmada Yeni Görüşün Esasları*, in M. Barlas (ed.), *Turgut Özal’ın Anıları* [Memories of Turgut Özal], Sabah Kitapları, İstanbul 1994; A. Yıldız, *Liberalizm-Muhafazakârlık Sarkacında “İnformel” Bir Demokrat: Turgut Özal’dan Kalan* [An “Informal” Democrat in the Liberalism-Conservatism Pendulum: The Legacy of Turgut Özal], in “Muhafazakar Düşünce”, vol. 15, n. 55, September-October 2018, p. 50-51.

was among the founding members of the current ruling party AKP. The presidency of the association has since been occupied by the sociologist Mustafa E. Erkal (b. 1944). Although still active, *Aydınlar Ocağı* has never again held an importance comparable to that which it reached between the 80s and 90s.

5. A 'hearth' for two families: nationalists and Islamists within Aydınlar Ocağı

Aydınlar Ocağı was therefore characterized by the coexistence of ethnic nationalists and Islamists. It was certainly not an absolute novelty, but perhaps it is the first time that the symbiosis has manifested itself in such an organic way. This did not mean, however, that the two groups abandoned their respective convictions and converted to a new ideology that synthesized or surpassed the traditional political identities of reference. Simplifying as much as possible, it is possible to clearly identify two groups within the association. On the one hand, we find an ultra-nationalist wing close to İbrahim Kafesoğlu and who had his tutelary deity in Nihal Atsız, while distancing itself from the latter on some relevant aspects. Most of the exponents of this group appeared for the first time with the founding of *Aydınlar Ocağı* in 1970. On the other hand, there is a group of intellectuals with a decidedly religious (if not openly Islamist) profile whose most relevant exponent is Süleyman Yalçın. These are generally personalities who were already involved in *Aydınlar Kulübü* and who were under the direct influence of Islamist thinkers such as Nurettin Topçu and especially Necip Fazıl Kısakürek.

At this point, it is necessary to clarify some aspects regarding the distinction presented here. First of all, it must be taken into account that not all members of the association necessarily had to fall into one of the two categories. Within the association there were those who had both influences and therefore developed ideas in a certain sense intermediate between eth-

no-nationalist and Islamist extremes. Still others had come to conservative positions following different and personal approaches and did not fit into either group. It is even more important to underline that the possibility of identifying these two ‘groups’ does not imply that they were in conflict with each other. The proposal to distinguish ethnic nationalists and Islamists has the function of categorizing some of the leading intellectuals of *Aydınlar Ocağı* on the basis of their ideological background. This operation has a necessarily illustrative and schematic character, which reduces the complexity of reality and puts in brackets the differences, even important ones, existing between the personalities included in the same category. Strange as it may seem for such a conservative association in Turkey, *Aydınlar Ocağı* was a composite and plural group, in which intellectual personalities with very different profiles coexisted.

Identifying ethnic nationalists and Islamists within the association is useful for understanding the relationship between nationalism and Islam in the context of the Turkish-Islamic synthesis. In this regard, different interpretations have been given, essentially summarized in three alternative positions:

1) The Turkish-Islamic synthesis as a form of nationalism: *Aydınlar Ocağı* is seen as a nationalist organization that has used religion with an instrumental approach⁴⁷.

2) As a form of Islamism: the ideology of *Aydınlar Ocağı* turns national vocabulary and symbols into a substantially religious project, in which Turkic identity is subordinated to Islamic one⁴⁸.

⁴⁷Erkan Akin/Ömer Karasapan, *The “Turkish-Islamic Synthesis”*, in “Middle East Report”, n. 1, July-August 1988, p. 18; Kurt, *The Doctrine...*, p. 114.

⁴⁸Çiler Dursun, *Türk-İslam Sentezi İdeolojisinin Failini Tanımak* [Knowing who theorized the Turkish-Islamic Synthesis], in “Radikal Gazetesi”, May 28, 2006; Ali Çağlar/Mustafa Uluçakar, *Günümüz Türkçülüğünün İslamla İmtihanı: Türk-İslam Sentezi ve Aydınlar Ocağı* [The Test of Contemporary Turkish Nationalism with Islam: Turkish-Islamic Synthesis and the Intellectuals’ Hearth], in “Hacettepe Üniversitesi Türkiyat Araştırmaları Dergisi”,

3) As a synthesis of Islamism and nationalism: according to this point of view, the convergence of nationalist and Islamist themes would have given rise to a new ideology aimed at synthesizing and overcoming ethnic nationalism and Islam⁴⁹.

The question of the nationalist or Islamic essence of *Aydınlar Ocağı* and of the Turkish-Islamic Synthesis has therefore not received a single answer and is open to interpretation. To respond adequately, it is possible to momentarily shift attention from the theoretical contents of the Turkish-Islamic Synthesis to the intellectual biographies and political and ideological backgrounds of the individual personalities involved in its elaboration and dissemination.

As we have seen, the names that recur several times in the intellectual and political formation of the members of *Aydınlar Ocağı* are those of Necip Fazıl Kısakürek and Nihal Atsız. Perhaps the most obvious difference within the conservative Turkish world concerns the role of ethnic origins and the Islamic religion in defining national identity. In this regard, Atsız and Kısakürek emerge as two radically opposed figures, whose conception of the nation appears completely irreconcilable. Kısakürek was to all intents and purposes an Islamist thinker. Although Kısakürek sometimes used an apparently nationalist vocabulary, he identified Turkish nationality exclusively with Ottoman heritage and Islam. He, therefore, did not place any value on ethnic origins and pre-Islamic Turkish culture. For his part, Nihal Atsız had developed a form of nationalism that was not only ethnic, but openly racist. Atsız held the ancient pre-Islamic Turkish civilization in the highest regard, while he was completely indifferent to Islam. Within the framework of the Turkish right, Kısakürek and Atsız thus represented

n. 26, spring 2017, pp. 124-125.

⁴⁹ Gökhan Çetinsaya, *Rethinking Nationalism and Islam: Some Preliminary Notes on The Roots of "Turkish-Islamic Synthesis" in Modern Turkish Political Thought*, in "The Muslim World", n. 3-4, July-October 1999, pp. 350-376.

opposite extremes regarding the conception of the nation and the role assigned to religion and ethnic origins.

Kısakürek's influence on *Aydınlar Ocağı* – and earlier on *Aydınlar Kulübü* – is an explicit and evident fact. As we have seen, Kısakürek was in fact involved in the foundation of the association, of which he chose the name and was in a sense a sort of 'godfather'. In general, it can be said that Kısakürek wanted to be an active protagonist in the process of convergence between the ultra-nationalist and religious world and also pushed for the alliance between these groups and the state. To achieve these goals, he often proved willing to reach ideological compromises that allowed him to be appreciated and create networks of followers even in environments other than the Islamist ones from which he came. As evidenced by the 1950s correspondence between Kısakürek and prime minister Adnan Menderes⁵⁰, the Islamist ideologue was able to occasionally set aside his religiosity for the sake of political opportunity.

Totally different is the case of Atsız, who on the contrary was not inclined to compromise and did not give his blessing to any initiative that was not of a totally ethno-nationalist nature. Atsız never regarded religious conservatives as his comrades. For Nihal Atsız, only nationalists – obviously ethnic nationalists, because that was the only way he conceived nationalism – could call themselves 'right-wing'. On the contrary, the Islamists, supporters of the Ummah and the Caliphate, were the bearers of an internationalist vision and an enemy of national values on a par with the socialists. So the idea of uniting nationalists and Islamists within the right was not a viable project⁵¹. Atsız's ideological hostility towards religious circles had even intensified very much in the last years of his life, paradoxically at the moment of maximum convergence between nationalists and Islamists (and perhaps

⁵⁰ Alattin Karaca, *Necip Fazıl'dan Menderes'e Mektuplar*, İstanbul, Kopernik Kitap, 2018.

⁵¹ Nihal Atsız, *Sağcı kimdir?* [Who is Rightist?], in "Ötüken", n. 50, February 1968.

also in reaction to this phenomenon). In 1970 – just as *Aydınlar Ocağı* was founded – Atsız threw himself furiously from the pages of his newspaper *Ötüken* against ‘religious bigotry’ (*yobazlık*), an anachronistic ideology opposed to nationalism⁵².

The extremely hostile positions held by Atsız towards the Islamists in the late 1960s and early 1970s were also the reflection of a fierce confrontation within the ethno-nationalist world itself. In those years, a rift developed between Nihal Atsız, ideologist and intellectual guide of the ultra-nationalist movement, and its political leader Alparslan Türkeş. The latter was trying to moderate the ethnic radicalism of Turkish ultra-nationalism and to re-embrace Islam as part of the national identity, with the aim of approaching Islamists and more moderate nationalists for political opportunity. Atsız saw all of this as a real betrayal on the part of his old protégé, and led him to further harden his anti-Islamic positions. Already on the occasion of the MHP congress held in Adana in 1969, Türkeş managed to have his standpoint imposed within the ultra-nationalist party. This shows that Atsız’s extremism and ideological intransigence were in the minority even in the relatively small environment of Turkish ethno-nationalism⁵³.

The refusal of any compromise with religious conservatism and other forms of nationalism that diverged from his ethnic ideal led in fact to Atsız’s self-isolation during the decisive phases for the construction of the political and ideological identity of modern Turkey. This circumstance has led some scholars, such as Umut Uzer, to underestimate the importance of Atsız’s contribution in shaping the ideology of the contemporary Turkish right.

Yet there is incontrovertible evidence of the profound influence that Atsız’s

⁵² Nihal Atsız, *Türkçülüğe Karşı Yobazlık* [Religious Bigotry against Turkish Nationalism], in “*Ötüken*”, n. 3, 1970, pp. 3-6.

⁵³ İlker Aytürk, *Nationalism and Islam in Cold War Turkey, 1944–69*, in “Middle Eastern Studies”, vol. 50, n. 5, pp. 710-712.

thought and work exerted on the most important and influential authors of the next generation, and especially on the members of *Aydınlar Ocağı*. İbrahim Kafesoğlu, first president of the association and main ideologue of the Turkish-Islamic Synthesis, in one of his last public speeches on an official occasion, described Atsız as one of the two main influences on his intellectual formation. The other came from Ziya Gökalp, who however was the founder of the social sciences in modern Turkey and is an almost obvious reference⁵⁴. The reference to Atsız, as well as surprising for the context, is instead significant from an ideological point of view.

Kısakürek, and especially Atsız, have generally been identified with their most original and divergent ideas from standards. Hence Atsız was characterized by his scientific racism, which led him to consider Turkishness first of all as a fact of blood, of which culture was, if anything, a consequence. On the other hand, Kısakürek is known above all for his rejection of ethnic identity and for his uncompromising Islamism. This has led some to underestimate the influence that an author like Nihal Atsız had in the evolution of Turkish nationalism, since racism – often perceived as the main idea of his thinking – did not pass on to subsequent generations. Kısakürek's total rejection of the pre-Islamic cultural heritage of the ancient Turks has often led to him seeing him as an exception and a peripheral figure to the mainstream right in Turkey.

To understand the influence these authors had on younger generations, it is necessary to shift attention to less striking and apparently less original aspects of their thinking. The idea of a continuity between the imperial and republican ages, hostility towards progressive social classes, extreme anti-communism and the obsession with the purity of national culture: here are some examples of the conceptions that were shared by characters such as Kısakürek and Atsız and which would have formed the core of ideas

⁵⁴ Donuk, *Prof. Dr. İbrahim Kafesoğlu...*, p. 5-6.

characteristic of the Turkish right in the second half of the 20th century. The different perspectives of Atsız and Kısakürek on the nature of national identity must be seen as borderline cases, which influenced many authors of younger generations but were rarely embraced in their entirety. Conservative nationalism in Turkey can be represented as a spectrum between two extreme poles, represented respectively by the ethnic nationalism of Atsız and the uncompromising Islamism of Kısakürek. On this issue, the majority of right-wing intellectuals would have positioned themselves somewhere within this spectrum, whose limits should be considered more as extreme points of a continuum than as two alternative and mutually exclusive proposals.

Despite the desire to converge in a common project and the many underlying similarities, the positions of Islamists and ethnic nationalists within *Aydınlar Ocağı* remained however different with regard to some aspects of great importance. In particular, the difficulty in finding a relationship between ethnic identity and religious confession should be emphasized. To highlight the differences on this issue, the particularly clear-cut views of the ultra-nationalist Altan Deliorman can be compared with those of the more Islamist Süleyman Yalçın.

A follower of Atsız and a close associate of Kafesoğlu, Deliorman maintained an uncompromising ethno-nationalist position throughout his life. In December 2007, Avni Doğan, a deputy from the ruling AKP party, argued in a public debate that «defining Turkey as a cultural mosaic is wrong. There is only one culture and it is Islam»⁵⁵. Doğan's statements, in addition to arousing scandal in the more secular sectors of society, provided Deliorman with the pretext to set out his point of view very clearly once again. In an article published in the Turanist periodical *Orkun*⁵⁶, Deliorman

⁵⁵ “*Kültür tektir ve İslam’dır*” [There is Only One Culture and That’s Islam], in «Hürriyet», December 6 2007.

⁵⁶ Altan Deliorman, *Tek Kültür İslam Mıdır?* [Is Islam the Only Culture?], in “Ötüken”,

responded in a rather articulate way to the statements of the deputy Doğan. Taking up the distinction introduced in Turkey by Ziya Gökalp⁵⁷, the author invited the ‘kind deputy’ to keep the concept of religious community (*ümmet*) separate from those of culture and civilization, which in turn do not coincide. Deliorman also made it clear quite explicitly that religious affiliation was for him subordinate to national affiliation. «Religion – concluded Deliorman – is only a part of culture» and therefore is confined to a substantially ancillary role with respect to an identity conceived above all in ethnic and linguistic terms.

The point of view of Yalçın was decidedly opposite, following the teaching of Kısakürek according to which only thanks to Islam is a Turk really a Turk. Islam is therefore not a component in support of national identity, but its deepest basis. This position essentially coincides with that of the deputy Doğan. In a 2012 interview, Yalçın criticized those who, within the center-right political and cultural area, denied the central role of Islam. On that occasion he explicitly referred to Deliorman – defined as «a pupil of Nihal Atsız» – and to Nevzat Yalçıntaş⁵⁸.

On the same occasion, Yalçın tried to give an image of Atsız more compatible with his own pro-Islamist point of view. While admitting that Atsız was not personally religious, Yalçın argued that the father of radical ethnic nationalism respected and held Islam in high regard as the ‘religion of the Turks’. In this regard, he reported an episode in which Atsız, overwhelmed by the magnificence of Istanbul’s religious architecture, allegedly admitted that «Turks are nothing but Muslims who speak Turkish»⁵⁹. However, this dialogue is highly unlikely, since it contradicts what Atsız wrote throughout his life and confirmed by contemporary witnesses. This is in all

n. 118, December 2017.

⁵⁷ Ziya Gökalp, *The principles of Turkism*, Leiden, E. J. Brill, 1968, pp. 22, 48.

⁵⁸ Tan/Çakkal, *Prof. Dr. Süleyman Yalçın...*, p. 99.

⁵⁹ *Ibid.*

likelihood a posthumous attempt to arrange a narrative more in line with developments in nationalism and conservatism in recent decades.

Yalçın and Deliorman were two important personalities of *Aydınlar Ocağı* and more generally of the conservative intelligentsia that supported the Turkish-Islamic Synthesis. Yet still, in the last years of their lives they expressed such conflicting opinions that they identified them respectively as an Islamist and an ethno-nationalist. The Turkish-Islamic Synthesis was therefore not a synthesis of nationalism and Islamism, but an interpretation of Turkish history and identity with which Islamists and ethnic nationalists could identify while maintaining separate identities. The construction of this identity narrative was the work of professional academics and historians, starting with Kafesoğlu himself. The overlap of political militancy and scientific rigor has been an essential feature of the work of *Aydınlar Ocağı* and the Turkish-Islamic Synthesis. This has contributed to giving a credible and apparently objective character to the ideological construction on which the political vision of the Turkish right has been based in recent decades.

6. Conclusions

The process that led to the formulation of the Turkish-Islamic Synthesis therefore largely coincides with the construction of the political right in contemporary Turkey. It is a story of ideas, but above all a story of men in flesh and blood: people who are different from each other, often coming from different experiences and schools of thought, but who have recognized themselves in a common political identity. These intellectuals referred to ideological models based on apparently distant principles – such as ethnic nationalism and Islamism – yet they could recognize themselves as part of the same group or, in other words, of the same faction.

The synthesis of nationalism and religious fervor that characterizes contemporary Turkish conservatism is the result of a long process of progres-

sive convergence between the different realities of what has been defining itself as the Turkish right in the second half of the 20th century. The formulation of the Turkish-Islamic Synthesis can be seen simultaneously as an effect and as a cause of the process of convergence between the different souls of the Turkish conservative world. The development of common doctrines and a shared imaginary between nationalists, Islamists and conservatives was certainly favored by the rapprochement between these different groups in the 1960s. In the following decade, the Turkish-Islamic Synthesis matured as an organic system of ideas at the center of a «conservative project»⁶⁰ which had the conscious and explicit objective of «integrating Islamists and nationalists»⁶¹. It was not just a question of uniting them among themselves within the framework of the Turkish right, but of promoting their integration into the state apparatus, making at least part of their principles penetrate within the republican ideology. The Turkish-Islamic synthesis, assumed at the center of the ideology of the Turkish state in the 1980s, would have reached a hegemonic position in the culture – not just politics in the strict sense – of the country. However, the coexistence between the different ideological orientations within Turkish conservatism was not without contradictions and difficulties.

Aydınlar Ocağı represented the spearhead of the conservative movement in contemporary Turkey, and for this reason it can legitimately be taken as an example of its internal dynamics. The political convergence between Islamists and nationalists has never meant a mutual assimilation between the two groups. Turkish rightist movement have always shown overlaps between Islamism, secular conservatism and ethnic nationalism, but these groups have always maintained a distinct identity throughout the history of

⁶⁰ Yüksel Taşkın, *Muhafazakâr Bir Proje Olarak Türk-İslâm Sentezi* [Turkish-Islamic Synthesis as a Conservative Project], in Tanıl Bora, Murat Gültekinil (ed.), *Modern Türkiye’de Siyasî Düşünce. Cilt 5. Muhafazakârlık*, İstanbul, İletişim, 2006, pp. 382-401.

⁶¹ Toprak, *Religion as State Ideology...*, p. 10.

modern Turkey, even when they have been active within the same political parties.

Those familiar with the studies on Turkish political culture might have in mind the now-classic image evoked by Tanıl Bora, according to which nationalism, conservatism and Islamism constitute the ‘three states of matter’ in which the Turkish right manifests itself⁶². The powerful image is useful for representing the symbiosis between these different ideological currents, but it risks overshadowing their differences and peculiar identities: while coexisting as elements of the Turkish right, they still exist as distinct realities.

At the basis of Turkey’s political culture, there is therefore no construction of a common ideology that could truly overcome and synthesize nationalism, secular conservatism and Islamism. Rather, it is a history of alliances, convergences and compromises between distinct ideological identities. The role of cultural associations such as *Aydınlar Ocağı* has been to provide a theoretical basis on which this process could develop. Considering the historical parable of contemporary Turkey, and bearing in mind what has been said up to this point, it can be said that the efforts of conservative intellectuals have been crowned with substantial success.

⁶² Tanıl Bora, *Türk Sağının Üç Hali: Milliyetçilik, Muhafazakarlık ve İslamcılık*, Birikim Yayınları, İstanbul 1998.

The isolated microcosms of the Caucasus: Alisa Genieva's Dagestan

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Summary

The thesis analyses and compares the Russian and the Islamic factor's influence during the last five hundred years in the North Caucasus, more specifically in Dagestan. This work aims to describe as accurately as possible today's Dagestan context in order to understand the causes and the mechanisms of the intrinsic instability in the region, and to do so through a literature that reconstructs its history, from the first half of the nineteenth century to the present day.

Keywords: *Dagestan, Russia, Islam, coexistence.*

INTRODUCTION

This work originates from a research carried out on two separate levels that inevitably ends up meeting, or rather, clashing. At the centre of the research, there is the Republic of Dagestan, one of the many Caucasian republics that make up the Russian Federation. The study focuses specifically on the Islamic and Russian factors in Dagestan, which have been coexisting in the Caucasus for more than two hundred years, not always peacefully. The so-called “isolated microcosms of the Caucasus” are constantly living through ideas of traditionalism, mysticism, Islamic fundamentalism and

much more, and from the author's perspective it is worth clarifying and diving into this plurality.

Caucasus has been thoroughly described by famous authors such as Puškin, Tolstoj, Lermontov among many others. However, these authors have always described the region while looking down on it, a common European attitude which Russians have also appropriated. The Caucasus has been portrayed as wild, inferior and in the constant need of modernization. With the above-mentioned premises, it is easily understandable why Alisa Ganieva's voice must be analysed. With a neutral yet loving eye, Ganieva depicts a perfect picture of the "isolated microcosms of the Caucasus" and especially of Dagestan, her native land. Through Ganieva's works a new shiny light is shined upon Dagestan: it is described through colourful markets, abandoned mountain villages and ethnic and religious conflicts, far from the generalized idea and prejudices that surrounded the region throughout the years.

The choice to focus on Dagestan is due not only to Alisa Ganieva's works (which were the cornerstone of this work) but also to the region's love-hate relationship with Russia. This unique relationship, while never culminating in a concrete desire for separatism as in near Chechenia, is slowly getting more complicated as it is intertwining with terrorism which has never been completely eradicated in the region.

1. Caucasus as described by Russians

1.1. The *topos* of the Caucasus' lands

The Caucasus entered the already vast Russian literature from the 1820s with Aleksandr Sergeevič Puškin's *Kavkazskij Plennik* [The Prisoner of the Caucasus]. Previous attempts to describe the region in works such as Gavriil Romanovič Deržavin's *Na vozvraščenie grafa Zubova iz Persii* [On the Return of Count Zubov from Persia] were not particularly success-

ful. This was due to the fact that, as stated by Vissarion Grigor'evič Belinskij, Russian literary critic and philosopher, and subsequently reported by Susan Layton, Deržavin had never been to the Caucasus, so he depicted the region through an image based more on his imagination rather than reality. On the other hand, Puškin great feat was depicting a precise and real picture of the Caucasus and its inhabitants².

He started a period in which numerous authors were writing about the Caucasus “from the inner”, thus offering a more realistic depiction of the region. Among the many works of this period, in this work the novel *Bela*, taken from Michail Jur'evič Lermontov's *Geroj našego vremeni* [A Hero of Our Time] as well as Lev Nikolaevič Tolstoj's *Chadži-Murat* [Hadji Murat] will be analysed.

The above-mentioned works are all set during the conquest of the Caucasus by the Russian Empire (1817-1864) and they all thoroughly describe the dual nature of this region: on the one hand it is considered the “birth-place of man”, where men corrupted by modern society can reconnect with nature; on the other hand, however, the Caucasus is also a place to conquer. The gullibility of Caucasus' natives reveals their simple nature, and this gives to the Russian Empire the right to completely subject them.

However, it is also worth to clearly distinguish the two different images that these three authors depict of the Caucasus, which could also be interpreted as two sides of the same coin. On the one hand there is Puškin and Lermontov's Caucasus, characterized by the native's violence and deception against Russians; on the other hand, there is Tolstoj's Caucasus, that is also characterized by violence and cruelty, but switching focus on the violence of the Russian army on natives.

² Vissarion G. Belinskij, *Sočineniia Aleksandra Puškina. Stat'ja šestaja. 1844* [Essays of Aleksandr Puškin. Sixth article. 1845], *Polnoe sobranie*, vol. VI (1953-1959), Moskva, USSR Academy of Sciences, in Susan Layton, *The Creation of an Imaginative Caucasian Geography*, in “Slavic Review”, vol. XLV N.3, 1986, pp. 471-475.

Kavkazskij Plennik tells the story of a Russian soldier captured by Circassians and ultimately freed by a young Circassian woman who fell in love with him. However, this love story is overshadowed by the description of Circassian's customs and way of life, which have been thoroughly studied by the Russian soldier during its captivity. He cannot hide a hint of admiration for that "admirable people".

Любил их жизни простоту,
Гостеприимство, жажду брани,
Движений вольных быстроту,
И легкость ног, и силу длани³;
He loved their ordinary life,
Hospitality, thirst for battle.
The promptness of free motions,
The foot's lightness, the hand's strength; (my
translation)

Circassians however are still violent and ferocious wildlings who grasp every opportunity to fulfil their bloodlust. In the work, violence reaches its apex during the Ramadan's celebration in the *aul*⁴: here slaves are beheaded to entertain the audience, among which children are seen clapping their hands as heads were flying.

Additional and exceptionally accurate descriptions of the "clever marauder's" night ambushes against travellers and conquerors alike at the Kuban River are used to depict a totally negative image of Circassians, which is used as an excuse to justify their subjugation as the Russian Empire is now

³Aleksandr S. Puškin, *Kavkazskij Plennik* [The Prisoner of the Caucasus] 1821, <https://ilibrary.ru/text/441/p.1/index.html>.

⁴ The term *aul* 'indicates a fortified village that can often be found in the Caucasus, especially in Dagestan.

elevated as the “rightful conqueror” that will bring civilization to wild and ignorant people.

The novel *Geroj našego vremeni* is a series of tales focused on Grigorij Pečorin, a Russian army officer in the Caucasus. *Bela* describes the “love story” between Pečorin and a young Circassian woman named Bela, who is actually kidnapped by the officer. The narrator describes this story after hearing it from his co-captain and temporary travel companion Maksim Maksimych, Pečorin’s superior in the fortress where the story takes place. The love story only serves as *fil rouge* which guides the reader through the Caucasus. The young Kazbič, who is in love with Bela too, represents the stereotype of the warlike and sanguinary Circassian, since he murdered Bela and her father. Bela too is labelled by Maksym Maksymič as “rebel” and revengeful when she sees Kazbič, the murderer of his father, and she starts to shake: the captain interprets it as desire for revenge, even if the girl’s reaction is completely understandable in such a situation⁵.

In addition, during the trip Maksym Maksymič insults and denigrates the local people. The Ossetians in particular are defined as «extremely stupid» and «incapable of any education»⁶ (my translation). For instance, though tipping was widespread in Russia, when the Ossetian coachmen ask for a tip Maksym Maksymič denies it and abruptly chases them away, saying that the savages are spoiled by Russians⁷.

Caucasian populations are thus divided into peaceful (like Ossetians) and warlike (like Circassians) but, despite a certain admiration for the courage of the latter, both are labelled as wild and uncivilized.

⁵ Luigi Magarotto, *La conquista del Caucaso nella letteratura russa dell'Ottocento: Puškin, Lermontov, Tolstoj* [The Conquest of the Caucaso in the Russian literature of the 19th century], Firenze, Firenze University Press, p. 187, 2015.

⁶ Michail J. Lermontov, *Geroj našego vremeni* [A Hero of Our Time], Sankt Peterburg', Iliya Glazunov & Co, 1840.

⁷ Luigi Magarotto, *La conquista del Caucaso nella letteratura russa dell'Ottocento: Puškin, Lermontov, Tolstoj*, p. 185.

The other side of the coin is presented by Tolstoj. *Chadži-Murat*⁸ takes its name from the valiant Avar general who, after disagreements with Imam Šamil, decides to surrender to the Russians and collaborate with them to obtain protection. The novel is soaked with blood and represents Tolstoj's mature condemnation of violence and war (in his youth he took part in the Conquest of the Caucasus, being a fervid supporter of imperial expansionism).

Chapter XVII (censored in the first publication in 1912) comprises one of the scenes that better illustrate the unmotivated massacre that was the conquest of these territories. Under the order of Nicholas I, Russian soldiers destroy and plunder an *aul*' (for the most part already abandoned) to leave the village without resources and force the Chechen mountaineers to surrender. The aforementioned chapter tells of the return of the Chechen to their destroyed village, and describes the gratuitous violence and inhumane treatment reserved to them by Russians:

Sado [...] saw his house destroyed: the roof was broken down, and the door and the columns of the small loggia burned, and the interior was upside down. His son, [...] was taken dead to the mosque on a horse covered in a felted coat. He had been hit in the back with a bayonet. [...] The apricot and cherry trees had been broken and burned [...] and, above all, the hives and bees had been burned. [...] The fountain had been smeared, obviously on purpose, so much so that no water could be taken from it. The mosque had also been smeared, and the mullah with his aides was cleaning it⁹. (my translation)

Russians are no longer considered men by Chechens, but pests that must be eliminated, like rats and poisonous spiders.

⁸ The name consists of two Arabic words: *xadži*, the title given to a Muslim who completes the *hajj* (the pilgrimage to Mecca), thus indicating the pilgrim, and *murat*, which comes from *murad*, meaning "desire".

⁹ Lev N. Tolstoj, *Chadži-Murat*, in *Posmertnye chudožestvennye proizvedenija L'va Nikolaeviča Tolstogo pod redaktsiej V.G. Čertkova* [Posthumous artistic works by Lev Nikolaevič Tolstoy by V.G. Čertkov], Berlin, Svobodnoe slovo, 1912.

What emerges from the three works is the powerlessness of the Caucasus toward the Russian Empire. Even in *Chadži-Murat*, where Tolstoj recognizes great dignity to the Chechen mountaineers who decide to rebuild the village, Russian's supremacy over Caucasians remains unchallenged. To this already tragic picture Puškin and Lermontov add, through their descriptions and judgement, the idea of "native poverty", which will bring Russian to perceive Caucasians as inferior by nature, as «creatures that are unable to take care of themselves»¹⁰. These stereotypes, legitimized by such an authoritative literature, haven't changed much over time and have created a significant rift between these two worlds.

1.2. The myth of the "prisoner of the Caucasus" between 1821 and 1996

Puškin's work was an inspiration not only for the subsequent literature, but also for the Soviet and post-Soviet cinema.

An interesting Soviet interpretation of *Kavkazskij Plennik* arrives in 1967 with the comedy *Kavkazskaja plennica, ili Novye priključenija Šurika*¹¹, translated in English as *Kidnapping, Caucasian Style*. The prisoner, in this case, is the stereotype of the good Soviet woman, Nina, who eventually managed to free herself. The film is imbued with irony and aims to make people laugh, but it does so by making fun of stereotypes created by the Russian literature over time: Nina is kidnapped by the general governor who can't dominate his passion for the young woman, and this reminds the reader of the kidnapping of Bela by Kazbič; when the governor and Nina's uncle bargain for Nina's hand, Bela's brother comes to mind, agreeing to kidnap her and hand her over to Pečorin for a horse. On the one hand, Caucasus seems to be firmly anchored to the Soviet Union (Šurik, for example,

¹⁰ Ewa M. Thompson, *Imperial Knowledge: Russian Literature and Colonialism*, Westport (Conn.) – London, Greenwood Press, p.15, 2000.

¹¹ Leonid I. Gajdaj, *Kavkazskaja plennica, ili Novye priključenija Šurika* [La Prigioniera del Caucaso, o le Nuove avventure di Šurik], USSR, Mosfil'm, 1967.

observes that the local customs he was looking for in the Caucasus do not exist anymore, since they have been replaced by Soviet elements¹². On the other hand, Caucasian lands remain partially extraneous to the Soviet-Russian civilized world, for which the kidnapping of the bride or her sale represent something alien and absurd, at most something to laugh about.

The same *topos* returns in the post-Soviet era, in particular during the wars in Chechenia. In 1996, the year that signed the end of the First Chechen War (1994-1996), Sergej Vladimirovič Bodrov's *Kavkazskij plennik*¹³ was released. The film picks up the theme of the kidnapping of the Russians by the Caucasians (in this case Chechens). However, it also manages to bring out the importance of the sense of humanity, which usually vanishes during the war.

If in the background there is war, the main theme on which the film invites to reflect is the pain of a parent when facing the loss of a child. Having experienced this suffering firsthand, the Chechen Abdul-Murat finally decides not to kill the Russian prisoner Vanja because he knows that he can spare someone else such torment (in addition Abdul-Murat knows Vanja's mother, who has arrived in the Caucasus alarmed by the letters of her imprisoned son). This is a different story if compared with homonym works, because it focuses on personal dramas that affect both Russians and Caucasians, marginalizing prejudices and stereotypes. It is interesting to point out that the two films reflect two different eras of relations between Russia and the Caucasus. As reported by Catherine Brown, there is a huge gap between the perception of the Caucasus by the generation that lived during the years of *Kavkazckaja plennica* and that of the more recent

¹² Thomas R.M.P Keijser, *The Caucasus Revisited. Development of Semantic Opposition from Puškin and Lermontov to the present*, in Herta Schmidt and Jenny Stellman, ed, *Lermontov neu bewertet/ Lermontov revisited*, München, Verlag Otto Sagner, 2013, p. 45.

¹³ Sergej V.Bodrov, *Kavkazskij plennik*, Russia – Kazakhstan, AO Karavan (Russia) – BG Prodakšn, 1996.

generation, for which the Caucasus is mainly represented by the wars of Chechnya: the first one has in mind sunny lands, good wine and food, a place for vacation, while for the second the Caucasus becomes again a dangerous and violent place¹⁴, and the reference to those authors who described the Caucasus in this way during the war of conquest is almost immediate: Puškin, Lermontov, Tolstoj.

2. North Caucasus and Russia

2.1. Russification in the pre-Soviet era

The Conquest of the Caucasus was completed in 1864. How the local population lived the Russian domination until 1917 remains controversial. Essentially, during the second half of the 19th century the North Caucasus remained substantially hostile and distrustful of the rulers, while in the first years of the 20th century the tension gradually faded away (not considering the 1905 Revolution, that was not limited to the North Caucasus), although it is not possible to define the situation as completely stabilized because of continuous disagreements between local people and central power.

The Russian Empire attempted a mainly administrative and cultural Russification of the territory, with the aim of “domesticating” and civilizing the locals. The administrative Russification aimed at concentrating power in the hands of the Russians, leaving the lowest positions to the locals, and introducing as a code of conduct the *adat*, a series of customary rules and prohibitions that governed relations among members of Muslim communities. However, this initiative was not very successful among the Chechen and Dagestani mountain communities, where the archaic jurisprudence persisted.

¹⁴Catherine Brown, *How Russia's writers saw the Caucasus*, in “Financial Times”, 2014, <https://www.ft.com/content/b17fbef0-8cda-11e3-8b82-00144feab7de>;

The cultural Russification had the purpose to spread the Russian language through the Orthodox missionary work and was relatively successful among the wealthiest locals, who understood its importance for education, work and a prestigious social position. Nonetheless, access to certain schools, as well as to higher education institutions, was restricted to a few, mainly children of powerful local families¹⁵. This created a clear gap between the majority of the local population, who remained in their *aul'* and did not speak Russian, and the small elite, who had made a career and conquered prestigious positions thanks to Russian education.

Despite these (relatively) good results, there were also black pages written by the Russian Empire in the context of the administration of the North Caucasus. These include the forced exile (or deportation) of about five thousand Dagestani mountaineers to Novgorod, Pskov and Saratov following the revolt of 1877, which led to the death of almost half of these due to the climate they were not used to and diseases.

Overall, the relationship between the local population and the imperial power from the conquest to the fall of the empire remained somewhat tense, although there were relatively few times when dissent resulted in serious riots. To contribute to the more or less concealed hostility towards the Russians, as well as to a government of the region that was mostly unfair and discriminatory, there were certainly also the still unhealed wounds caused by the brutal conquest.

2.2. Sovietization

During the Russian civil war between Red Army and White Army, the Caucasian population mostly supported the first, blinded by the promises of the Bolsheviks, which ensured respect for nationalities and the right to self-determination for all peoples. The Red Army finally emerged victo-

¹⁵ Jeronim Perović, *From Conquest to Deportation: The North Caucasus under Russian Rule*, New York, Oxford University Press, pp. 92-93, 2018.

rious from the clash in 1920 proclaiming the Soviet Mountain Republic, which included all the peoples of the region; exceptionally, Dagestan was established as an autonomous republic¹⁶.

The determining factors in the relationship between the Soviet government and the local population were essentially two: cultural politics, which oscillated between “derussification” and assimilation, and collectivization.

Collectivization met strong resistance in the North Caucasus and took on anti-religious attitudes. There were several riots, whose main aim was not obtaining independence, but rather defending the traditional way of life and a certain social organization, menaced by collectivization¹⁷. These riots only managed to slow down the process, but at the end of the 1930s the Soviet government succeeded in reaching its objectives for the region. Collectivization caused in the Caucasus what it did in the rest of the Soviet Union, namely the suffering and starvation of many peasants forced into collective farms.

The term *korenizacija* (“put down roots”) indicates the set of policies adopted by the Soviet government between the 1920s and the end of the 1930s, aimed at the political and cultural integration of non-Russian populations. The main goals were the inclusion of local representatives in the government (at lower levels) and the elimination of the Russian element brought by the Tsarist Empire in favor of the “native” one, which in short will only be reflected in the use of the local language. The last period of *korenizacija*, which coincided with Stalin’s authoritarian squeeze and the Great Purges, saw a reversal of policy towards non-Russian national cultures. In 1938 the teaching of the Russian language became compulsory,

¹⁶ Jeronim Perović, *From Conquest to Deportation: The North Caucasus under Russian Rule*, p.142.

¹⁷ Jeronim Perović, *From Conquest to Deportation: The North Caucasus under Russian Rule*, p.250.

encouraging what Vernon Aspaturian calls “Russianization¹⁸”. Over time, the school system was progressively oriented towards the Russian language and culture, so that, if in 1932 teaching in the primary and secondary schools of the Soviet Union was accessible in 104 different languages, depending on the mother tongue of the students, at the end of the 1970s, the languages of instruction dropped dramatically to 14¹⁹.

During the war, the demographic engineering operations involving the North Caucasus were particularly dramatic. Operation Čečevica (“lentil”) of February 1944 involved the deportation of half a million Chechens and Ingushes to Central Asia (officially due to their collusion with the Germans, but the war was probably used by Stalin to get rid of elements that already had long been disturbing due to their little inclination to submit), a fifth of whom died during the journey.

When after 13 years they obtained the permission to return to their lands, they found them occupied by Dagestani mountaineers who had been deported to the valley to cultivate the abandoned lands, and this caused territorial and ethnic conflicts to which the Soviet government could never find a satisfactory solution for all parties.

¹⁸ «Sovietization is [...] the process of modernization and industrialization within the Marxist-Leninist norms of social, economic and political behavior. Russianization is defined as the process of internationalizing Russian language and culture within the Soviet Union [...]. Finally, Russification [...] is defined as the process whereby non-Russians are transformed objectively and psychologically into Russians, and is more an individual process than a collective one», Vernon V. Aspaturian, *The Non-Russian Nationalities*, in “Prospects for Soviet Society”, ed. Allen Kassof, London, Pall Mall Press, pp.159-160, 1968.

¹⁹ Aleksandr A. Araf'ev, *Deti iz semej inostrannykh migrantov kak novoe javlenie v rossijskikh školach: socio-lingvističeskie i èkonomičeskie aspekty* [Children belonging to foreign migrant families as a new phenomenon in Russian schools: sociolinguistic and economic aspects], in “Demoskop”, N.441-442, 1st-10th November 2010, <http://www.demoscope.ru/weekly/2010/0441/analit01.php>.

2.3. The cultural identity of Dagestan

With about 40 ethnic groups and 14 official languages Dagestan is the most multiethnic Republic in the Russian Federation. Among the most numerous ethnic groups are the Avars (30% of the total population), the Dargins, the Kumyks, the Lezgins and the Laks.

It is important to distinguish three sets that define the belongingness of Dagestan's inhabitants at three different levels. The superset is what defines them *rossijane* ("Russians", understood as a citizen of the Russian Federation); within this superset there is the subset that defines them as *Dagestancy* ("Dagestani", inhabitant of the Republic of Dagestan), within which there are many subsets divided by ethnic group (these include the Caucasian groups listed above, but also the *russskie*, that is, the Russians understood as an ethnic group).

Even if some people may identify themselves with each of these definitions, it is much more likely that one will prevail over the others, especially when a choice has to be made (for example, when one introduces himself and wants to specify the place of origin).

This problem of definitions and labels is very topical and felt in the republic itself: in January 2017 the seminar "Formation of the Russian civil-political nation, cultural and civil identity of Dagestan: trends, problems, objectives and perspectives" was held, whose purpose was to determine how correct ethnic identification could be in the republic.

It has been argued that people who live in Dagestan identify themselves more often as representatives of a certain ethnicity, rather than as Dagestanis or Russians²⁰; others, however, now far from their ethnic group, tend to identify themselves as Dagestanis, therefore with their place of resi-

²⁰ Michail Dabydov, *Kak predstavljat'sja: dagestanec ili roccijanin?* [How to introduce yourself to others: Dagestani or Russian?], "Kavkaz Post", 18th January 2017, <https://capost.media/news/obshchestvo/kto-kruche-dagestanets-ili-rossiyanin>.

dence. This topic is also often addressed by Alisa Ganieva, a young Dagestani writer and literary critic belonging to the ethnic group of the Avars, who notices (with bitterness) the abandonment of culture, language and traditions of the different ethnic groups by young people, while the Russian element (perhaps because it is connected to modernity) is becoming more and more attracting for them: they only speak Russian, they watch Russian television programs, they no longer respect age-old ethical norms. However, the situation is more complex because these young people, in Ganieva's words, do not even feel themselves to be *rossijane*, because they are often discriminated against by their own compatriots, treated as foreigners belonging to a completely different world²¹.

The future scenario promises to be somewhat uncertain, but the most desirable one could include a synthesis of all the components discussed: hopefully, in the future, Dagestanis will not give up their ethnicity and keep their language and traditions alive, without these provoking inter-ethnic rivalries and precluding them to also feel part of that space shared with other ethnicities, Dagestan, which was and is, moreover, the background of a common history. In the best scenario the relationship with Russia could also improve (thanks to effective inclusion policies, which do not aim to undermine the ethnic element), so that Dagestanis can feel fully part of Russian society, and above all be recognized as such from the latter.

3. Caucasian Islam

3.1. The post-Soviet Islamic revival

After its Islamization in the 7th century by the Arabs, Dagestan became over time the stronghold of Islam in the Caucasus (the *de facto* capital of the Imamate of the Caucasus, for example, was the village of Gimry, the

²¹ Alisa Ganieva, 'Pervoe, čto prichodit v golovu na vopros o molodykh dagestancach – èto rasščeplennoe soznanie.' ['The first thing that comes to mind when asked about Dagestani youth is a divided conscience'], interview by Anna Stroganova, 19th February 2011.

birthplace of the first Imam Ghazi-Mulla and Imam Shamil). Due to its privileged role in everyday life, which has always pervaded every aspect of the life of the faithful (private, public, spiritual, educational, political), it is easy to understand why more than seventy years of Soviet rule and religious repression have failed to scratch its importance on the territory. Although communism opposed religions, the Soviet government decided not to try to completely eradicate Islam from the Caucasian republics (probably because it was aware that it would be a failed and counterproductive attempt), and instead to keep it under strict control, which in fact allowed it to survive, but with extreme limitations. Four spiritual directors were created by Stalin in 1942, each responsible for controlling the religious life of Muslims in a specific area (Central Asia and Kazakhstan, European Russia and Siberia, North Caucasus and Dagestan, Transcaucasia)²². Basically, the Soviet government authorized only religious activities under the control of the directors, i.e. those carried out in authorized mosques and by regularly registered religious officials, while all religious activities outside were prohibited and repressed²³.

In the shadow of what Anna Zelkina calls “Soviet secular version of Islam”, an “underground” Islam resisted, that perpetrated Islamic traditions and managed to develop a dense network of religious schools, thanks above all to “parallel” religious leaders belonging mostly to the Sufi orders²⁴. Although rites and ceremonies performed outside the control of the direc-

²² Alexandre Bennigsen & Chantal Lemer cier- Quelquejay, ‘Official’ Islam in the Soviet Union, in “Religion in Communist Lands”, vol. VII, N. 3, 1979, pp. 148-149.

²³ Alexandre Bennigsen & Chantal Lemer cier- Quelquejay, ‘Official’ Islam in the Soviet Union, p.150.

²⁴ Sufism is the “doctrine and discipline of spiritual perfection [of Islam]. It is presented as a set of methods and doctrines that tend to the inner deepening of religious data, to preserve the community from the risk of a stiffening of faith and an arid and legalistic literalism “(Treccani, <https://www.treccani.it/encyclopedia/Sufism/>, my translation). It is particularly known for its multiple expressions, which mainly concern poetry and music, and is often referred to as the mystical side of Islam.

torate (and the Soviet government) were prohibited, there was a certain degree of tolerance for those not directly attributable to religion, in which Islam was more of a substratum, and which could be justified as elements of indigenous culture (which Soviet politics admitted)²⁵. How much and what was tolerated is not easy to establish, given that the religious policy of the Soviet Union was in some periods (e.g., during the 1930s and early 1960s and 1980s) more repressive than in others²⁶.

The Islamic revival in Dagestan originated in the mountainous areas of the northwest, less controlled by the Soviet authority, and then followed the mountaineers downstream between the Terek and the Sulak between the 1950s and 1970s. Taking advantage of the loosening of the party's grip during the Gorbačëv era, Muslims began to make their demands and to claim their religious freedom, but in a fragmented way often depending on the ethnic group.

Ultimately, it can be said that towards the end of the Soviet Union, and in particular with its fall, there is a renaissance of Islam in Dagestan, characterized by a high degree of politicization and fragmented by ethnic group; consequently, for the Muslims belonging to the various ethnic groups the resistance against the Russian infidels in the 19th century, which reunited their ancestors in the name of the holy war, became only a distant memory. More than a renaissance, moreover, it seems more correct to speak of the emergence of a new Islam that had grown underground.

3.2. Sufism and the Wahhabi fundamentalism

Alongside Sufism, and to some extent in response to it, between 1993 and 1994 “purist” groups began to emerge, supporters of a conservative and

²⁵ Anna Zelkina, *The 'Wahhabis' of the Northern Caucasus vis-à-vis State and Society: The Case of Dagestan*, in Moshe Gammer, ed., *The Caspian Region, Volume 2: The Caucasus*, London, Routledge, vol. II, 2004, pp. 147-149.

²⁶ Sergej Abašin, *A Prayer for Rain: Practicing being Soviet and Muslim*, vol. XXX, N.2, 2014, p. 179.

rigorous Islam, denouncing the local religious tradition oriented towards Sufism²⁷. Their origin coincides with the opening of the USSR to the rest of the world thanks to *perestroika*, which favored exchanges with the Arab world. Although these groups did not share the same level of intransigence, «they became universally labelled as Wahhabis and perceived as an alien and hostile group by most Daghestani Muslims»²⁸ hence the term “Wahhabi”²⁹ took on a negative connotation.

Wahhabism did not have a large hold on the Dagestan population overall (in 2000 it did not exceed 3%), but to the poorest the turn towards religious rigorism seemed the only possible answer to the problems of post-Soviet society, since Sufism did not provide immediate solutions (focusing more on introspection) and official Islam, represented by the Spiritual Council of Muslims of Dagestan, increasingly lost trust among the faithful due to collaboration with the notoriously corrupt political establishment³⁰.

Wahhabism posed a danger as much to the political elite (as Wahhabis complied only with Qur’anic law) as to Sufism (as it represented an opponent in the region’s religious leadership and blamed Sufi orders for deviating from true Islam), so they decided to join forces against the newcomers: Wahhabis were forbidden to enter mosques, teach and were banished from their villages. In 1996 the clash between Sufis and Wahhabis turned into open conflict: it culminated in the invasion of the areas of Botlich and Cumada (Dagestan) by a small group of Dagestani and Chechen jihad-

²⁷ Anna Zelkina, *The ‘Wahhabis’ of the Northern Caucasus vis-à-vis State and Society: The Case of Daghestan*, p. 156.

²⁸ Anna Zelkina, *The ‘Wahhabis’ of the Northern Caucasus vis-à-vis State and Society: The Case of Daghestan*, p. 157.

²⁹ The movement, born in the 17th century in the Arabian Peninsula, takes its name from its founder Muhammad ibn ‘Abd al-Wahhab and insists on the literal interpretation of the Koran, condemning as enemies of Islam all those who do not interpret it in this way (Wikipedia, <https://it.wikipedia.org/wiki/Wahhabism>).

³⁰ Robert B. Ware & Enver Kisriev, *The Islamic Factor in Dagestan*, in “Central Asia Survey”, vol. XIX, N. 2, 2010, p.238.

ists, which started the Second Chechen War. In the meantime, there had been a change at the top of the Russian government and consequently a turnaround in Caucasian politics: the new Prime Minister Vladimir Putin, judging the work of his predecessor Boris Elcin as weak and inadequate, managed the situation with an iron fist, declaring open war on “terrorism”, whose perpetrators were identified both among separatists and civilians who followed the more conservative Islam.

3.3 The 2000s

The Second Chechen War (1999-2009) marked the tightening of relations between the Russian authorities and more conservative Islam, which included not only terrorists who aspired to create an Islamic state through violence but also civilians who followed a stricter Islam.

The Russian intervention, presented primarily as a counter-terrorism operation³¹, was largely supported by Dagestanis, who feared the Chechen gangs more than Russia in the period between the two wars in Chechnya³². The counter-terrorism operations did not end with the end of the war, but have continued up to the present day. However, the terrorists' base of operations moved from Chechnya to Dagestan, which in 2011 was labeled by the BBC as “the most dangerous place in Europe”³³. Islamic terrorist actions also spread to the rest of Russia, with a toll of thirteen major attacks and about 1000 victims between 1999 and 2015.

According to Emil Souleimanov, the roots of the violence that unleashed in Dagestan at the end of the Second Chechen War can be traced back to the harsh treatment reserved for suspected Wahhabis by local author-

³¹ Roland Dannreuther, *Islamic Radicalization in Russia: An Assessment*, in “International Affairs” (Royal Institute of International Affairs 1944-), vol. LXXXVI, N. 1, 2010, p. 215.

³² Robert B. Ware, Enver Kisriev, Patzelt Werner & Ute Roericht, *Stability in the Caucasus: The Perspective from Dagestan*, in “Problems of Post-Communism”, vol. 50, N.2, 2003, p.20.

³³ Lucy Ash, Dagestan – the most dangerous place in Europe, in “BBC News”, 24th November 2011, <https://www.bbc.com/news/magazine-15824831>.

ities, especially the police. This would later lead the victims or his/her family members to join the Islamist rebels in the mountains to plan their revenge, and right here they would be further exposed to the principles of Salafism³⁴, i.e. the new denomination of the more uncompromising and rigorous Islam that replaced the word Wahhabism. Among the Salafis there were certainly terrorists who disseminated violence and terror to establish an Islamic State based on Sharia law, but also Muslims who simply wanted to follow the precepts of Islam more strictly, who did not disdain the creation of the Islamic State, but were not ready to create it with violence and at any cost. Given the violent and not always respectful of human rights methods employed by Putin's Kremlin, repeatedly denounced by Human Rights Watch³⁵, this vicious circle, which in part has the effect of fueling terrorism, seems far from breaking.

Moreover, in the North Caucasus terrorism is mainly linked to the youth. Among the extremists' favorite targets for recruitment, there are undoubtedly young people, as they are more exposed to propaganda via the Internet and social networks, but also because they are easier to influence and mislead. They are greatly fascinated by extremists because of the lack of prospects for the future in Dagestan, where the youth unemployment rate is very high, but also because of the sense of injustice they feel in their country.

³⁴ Emil Souleimanov, *The Upsurge of Islamist Violence in the North Caucasus: Exploring the Case Studies of Dagestan and Kabardino-Balkaria*, in "Connections", vol. XIV, N. 4, 2015, p. 120.

³⁵ Human Rights Watch, *'Invisible War'. Russia's Abusive Response to the Dagestan Insurgency*, 2015, <https://www.hrw.org/report/2015/06/18/invisible-war/russias-abusive-response-dagestan-insurgency>.

4. Dagestan told by Alisa Ganieva

4.1. *Salam, Dalgat!*

With the long story *Salam tebe, Dalgat!* [Salam, Dalgat!] Ganieva won the Debut Prize in 2009 and established herself as an author in the literary panorama, being already known as a literary critic. The young Dagestani woman of Avar ethnicity was born in Dagestan but grew up between the Caucasus and Moscow and succeeded in bringing to the attention of readers a reality, the one of the “isolated microcosms of the Caucasus” (indeed fragmented into many small realities, which are still unknown to many today), through «ordinary people and [...] universal human collisions understandable to each and every one on this earth»³⁶.

The story is set on the streets of Machačkala, where the protagonist, Dalgat, wanders for a whole day in search of his uncle, to whom he must deliver an important letter. Following Dalgat along the road, the reader meets different characters and scenes, many “fragments” of Dagestan which, when recomposed, illustrate the local daily life. The present in Dagestan is characterized above all by the ongoing “civil war” between the state and Islamic terrorists, which also involves other figures, like Sufis and Salafis. Sufi Islam is represented by Arip, an acquaintance of Dalgat, who tries to convert the boy and to convince him to move away from secular customs. Salafi Islam degenerating into terrorism is instead represented by Murad, Dalgat’s cousin. While Arip is in favor of the introduction of the sharia law and a reform of the ruling class, but he does not wish a separation from Russia, Murad praises the creation of an independent imamate and the expulsion of the Russian infidels and, although he does not speak directly of killing infidels, he tells Dalgat that he will later hide a mysterious package

³⁶ Alisa Ganieva, *Alisa Ganieva, se il Caucaso si separasse dalla Russia*, [Alisa Ganieva, if the Caucasus separated from Russia], interview by Maria Elena Murdaca, 27 dicembre 2012, <https://www.balcanicaucaso.org/aree/Daghestan/Alisa-Ganieva-se-il-Caucaso-si-separasse-dalla-Russia-127531>.

in his home. The story describes both the abuse of power by the authorities (cops and special departments) on suspicions of terrorism, and the violence and attacks by terrorists against the cops, who are “killed like flies”.

Another important theme that is discussed are stereotypes and prejudices that Caucasians and Russians have toward each other. In the text we find the same 150 years old prejudices consecrated by Russian literature in the 19th century. These prejudices nowadays are mainly fueled by news reports spread in Russia concerning the North Caucasus, which are for the most part negative and speak of violence and terrorism, but also more superficially by certain behaviors (irrational, violent and vengeful) that are attributed to Caucasians in Russian movies or TV series.

For example, Mesedu, Dalgat’s friend, tells Dalgat that she’s going to move to Saint-Petersburg, but she intends to hide his ethnic identity instead of integrating it into his new life, demonstrating that, despite the Russian citizenship common to all ethnic groups, the most privileged remains the Slavic group.

In a meta-novel that Dalgat reads, the present chaos (represented by the city of Machačkala, “exhausted by the multitude of its inhabitants” is contrasted with the idyll of the past, made of memories of important villages (now in ruins), of valiant peoples who have inhabited plains and mountains and of splendid and uncontaminated landscapes. The abandonment of the villages to move to the city is the symbol of the abandonment of traditions, culture and stories, which Ganieva aims to save before they vanish completely.

4.2. *The Mountain and the Wall*

The novel *Prazdničnaja gora* (translated in English as *The Mountain and the Wall*) picks up and enriches the framework presented by *Salam, Dalgat!*. It is a contemporary dystopia, where Russia builds a wall on the

border with the Caucasus. The perspective offered to the reader is mainly that of Šamil, a young Avar, an example of that new generation struggling to define its own identity, who through his wanderings in the streets of Machačkala and his encounters carries on the narrative. The novel is made up of multiple voices and multiple perspectives, in fact Genieva states that «the main character is the region itself... its multiplicity of perspectives»³⁷. The story unfolds through three main themes: daily life, the celebration of Dagestan culture and the separation of the Caucasus from Russia. Among the themes that recur most frequently in the dialogues are corruption and nepotism: people in Dagestan must pay to get into university and pass exams, but also to get a job, or have the right connections to get some privileges. Another theme that is often presented through the eyes of Šamil and the other characters is the widespread violence that reigns in the city, but is now discussed as an everyday occurrence, slipped in between speeches, as something ordinary. Religion is a constant presence throughout the novel, but take on relevance towards the end, with the fundamentalists' seizure of power. The tendency of many characters, especially the youngsters, is to maintain a certain distance from religion. However, the rivalry between Sufis and Salafis is always very much alive, with the latter wishing for a State governed by Sharia law to drive out the corrupt unfaithful. Madina, Šamil's promised bride, believes in the creation of a just State too, and in a short time she decides to adhere to Salafism and to secretly marry an alleged Wahhabi. Her dream soon turns out to be a mere illusion when fundamentalists violence also turns to her family, and when it becomes clear that privileges of the previous ruling class have been simply transferred to the leaders of the Caucasus Emirate. Machmud Tagirovič's meta-novel, on the other hand, celebrates the traditions and culture of Dagestan before the

³⁷ Alisa Genieva, *A conversation with Alisa Genieva*, in "Music&Literature", interview by José Vergara, 22nd March 2021, <https://www.musicandliterature.org/features/2021/3/20/rkt6gk276itn5d0tqip4egdlz1hyz6>.

October Revolution, and does so through fragments of daily life, steeped in customs, rituals and propitiatory superstitions, under the pretext of recounting the life of Chandulaj. Referring to the epic poems he heard from his father's friends, Machmud Tagirovič tells of a place called Rohel-Meèr, or the festive mountain, where all souls would go after death. The magical place of the festive mountain, like all the beliefs, customs and traditions that emerge from the meta-novel and the novel-container, are part of the reality that Ganieva wants to immortalize before it vanishes. To the climate of violence and corruption that now reigns, the author tries to find a counterbalance by recalling a past that, unfortunately, has less and less to do with the present, since the loss of roots, especially ethnic and linguistic ones, generates in young people a sense of loss about their identity, which does not allow them to identify with that past that Ganieva tries to save.

From the very first pages the theme of the dividing wall between Russia and the Caucasus is introduced. The news stimulates different reactions: incredulity, hope, joy, fear, but also separatist ambitions in the case of two minor ethnic groups, the Kumyks and the Lezgins. The popular reaction to the Russian separation is well summarized by the words of Arip, a friend of Šamil who lives in Moscow and crossed the border by bus to return home to Dagestan. When Šamil asks him what the situation is like in Moscow, Arip replies that «anyone with any brains is scared, Shamil, and fools are celebrating. They think that they've solved all their problems, that by stopping the subsidies they're saving money. But have we ever seen any of those subsidies here?³⁸». Those who rejoice in the separation are the Russians who consider the Caucasus an unnecessary burden that only absorbs resources like a bottomless pit (it is known that 90% of Dagestan's state budget is made up of central government funds), and who over time have given rise to a protest movement under the slogan of “chvatit kormit’

³⁸ Alisa Ganieva, *Prazdničnaja Gora*, Moskva, Astrel', 2011 (English translation by Carol Apollonio, *The Mountain and the Wall*, Dallas, Deep Vellum Publishing, 2015).

Kavkaz” (enough to feed the Caucasus). In reality, the money arrives in the Caucasus but not to the citizens, otherwise it would not be possible to explain the high unemployment rate, especially among young people, and the general level of discontent of the population. Sitting in a café with Arip and other acquaintances, discussing who and what to blame for the turn of events (the East, the Western secret services, the Caucasians themselves or the fall of the Soviet Union), Šamil surprisingly takes the floor, after having been basically a passive character throughout the novel, blaming the *Specnaz*³⁹, who «made a nice living on our corpses, and then they abandoned us, like, ‘Now you can rot in hell.’»⁴⁰, and explaining that counter-terrorism operations were made longer in order to increase their earnings. Arip also predicts that «with fascists in power, [Russians] will feel authorized to send their air force to bomb us. We are a den of thugs, aren’t we?»⁴¹. Arip’s prediction at the end comes true and Russians begin bombing the region. Šamil also falls victim, and although the chapter elusively closes with the young man fainting, it is easy to imagine that bombs have razed everything to the ground. The epilogue, however, contrasts with this tragic end: on the festive mountain the characters of the novels meet to celebrate Šamil and Asja’s wedding, while war and violence are no longer in evidence. The ending that Ganieva chooses for the novel is probably dictated by the desire to let the disappearing reality (that of traditional culture) prevail over the sad reality that has taken over and proved to be unsuccessful and dreadful. The festive mountain represents, from this point of view, the last alternative, the last foothold to continue to “live” when in the earthly world it is no longer possible.

³⁹ It is the abbreviation of “Vojska spezial’nogo naznačenija”, i.e. “special forces”. In this case the term indicates Russia’s special forces, part of which was involved in counter-terrorism operations in the Caucasus.

⁴⁰ Alisa Ganieva, *Prazdničnaja Gora*.

⁴¹ Alisa Ganieva, *Prazdničnaja Gora*.

Women Contribution to the Modern Political Space in Iran

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SUMMARY

This article examines part of the Political Participation of Women in Iran, from Reformist President Khamati to the present time. In specific, it focuses on their engagement and challenges for women in Iranian Presidency and Parliamentary (Majles) Elections.

Keywords: *Iran-Women-Political Participation-Political Parties- Iranian Political Power.*

INTRODUCTION

In recent decades, the role of women in the Iranian political system has been examined through the lens of women's visibility during presidential elections and political campaigns. Women are one of the key segments of Iranian society in terms of potential tools for political mobilization during electoral processes. In recent presidential elections, various candidates promised to give more space to women in political activities and to delegate key roles to them, although only a few positions that have been nominated are held by women.

Under the Iranian Constitution, Iranian citizens of all cultural and ethnic backgrounds, regardless of their gender, equally enjoy individual, economic, political, social, and cultural rights. However, while Iranian political decision-making is still male dominated, most graduates of Iranian universities are women. Despite the recognition of their rights and the possession of a high level of education, Iranian women still face several barriers to their political emancipation. The main aim of this article is to emphasize how the political participation and activities of women have changed during the reformist group, *Eslah talaban*, and conservative group, *Osul garayan*, in Iran.

The participation of women in political activities is an important issue around the world. Almost half of the population of any country are women and it is clear that democracies cannot succeed without the participation of women in politics. Since 1979, women's socio-political conditions within the Islamic Republic of Iran, have changed drastically, especially for those who are deemed progressive, but at the same time, it has opened more space and possibility for religious women who follow the rule of the new Islamic state. Progressive women under the Islamic Republic of Iran continue to advocate for gender equality and children's rights. They achieved a degree of progress towards these goals during Khatami's presidency, through new openings for civil society engagement.

Iranian Women NGOs and Educational level

One of the important international conferences centred on the role of women was the Fourth World Congress on Women held in Beijing in 1995, where women from many different backgrounds participated, especially from Muslim world. This event focused on increasing women's participation in politics and in its "Platform of Action" recommended ways and means to the participating countries to increase "space for and visibility"

of women in political institutions and processes.²

For the first time since the 1979 revolution, Iranian women activists, through some NGOs “approved by the Iranian government,” were permitted to participate in this conference. As a result of this engagement, women’s organizations in Iran adopted the contextual strategy laid out by the Congress and started establishing some independent NGOs related to the issue of women’s and children’s rights.³ From 1996 to 2007, the number of women’s NGOs in Iran increased dramatically from 55 to 800⁴.

Women’s empowerment through different NGOs in Iran had a very important impact on raising women’s political knowledge and civic participation. Achieving greater rights for women and children through political participation became one of the chief strategies for the new wave of women activists. This period coincided with the jump in female enrolment at Iranian universities. In fact, in 1998 the number of female students surpassed that of male students (51%) for the first time in state universities. In 2012, female students’ admission accounted for 63% of the total number of students admitted.⁵ Iran has a relatively young population. This was especially pronounced in 2001, when 71% of Iranians were under the age of thirty and 44% were under the age of fifteen. Women’s empowerment programmes enacted during reformist President Khatami’s term in office also impacted the rise in the number of women advocating for their rights.⁶

Besides the role of the NGO’s also other socio-political spaces, govern-

² See the *Beijing Congress documents*: <https://www.un.org/womenwatch/daw/beijing/fwcwn.html>

³ Samira Ghoreishi, *Women’s Activism in the Islamic Republic of Iran Political Alliance and the Formation of Deliberative Civil Society*, Palgrave Macmillan, 2021. P.145-146

⁴ Ibid.

⁵ Goli M. Rezai-Rashti and Somayeh Fereidouni, *The Voices of Female Students in Iranian Universities, The Unintended Consequences of University Education*, IN VOLUM: *Women, Islam, and Education in Iran*, Edited by: Goli M. Rezai-Rashti, Golnar Mehran, Shirin Abdmolaei, Routledge Critical Studies in Gender and Sexuality in Education, 2019. P. 35.

⁶ Ibid.

mental and non-governmental organizations played an important part in this growth.

In 2008 during President Ahmadinejad's term, women's enrolment in higher education reached 66% of the total enrolment. Soon, however, Iranian women became a target for tackling economic problems by reinstating a gender imbalance both in universities and in the job market. Many universities applied a "rigid gender quotas system"⁷ by which a specific number of seats and courses were designated for men only.⁸

The engagement of Iranian women in the educational sphere and job market has undergone various challenges throughout the different periods of political power in Iran, from reformist President Khatami (1997- 2005) to the ultra-conservative President Ahmadinejad (2005-2013) to the recent moderate presidency of Rouhani (2013-2021). Nonetheless, today most university seats are occupied by female students and women play an essential role in the economy. The percentage of women in higher levels of employment such as political leadership, managerial and decision-making positions is still very low, and women face many obstacles in the workplaces and in the halls of power. In 2019, during Rouhani's presidency, women managers represented 18.8 percent of the workforce, and women were 41 percent of all government employees. This is significant considering that the number of unemployed female graduates is 4 times that of male graduates.⁹

⁷ Nazanin Shahrokni, *Protecting Men and the State, Women, Islam, and Education in Iran*, Edited by: Goli M. Rezai-Rashti, Golnar Mehran, Shirin Abdmolaei, Routledge Critical Studies in Gender and Sexuality in Education, 2019. P. 93.

⁸ Azam Alizade, Parvaneh Danesh, *یت‌سیسنج یدنب هی‌م‌س یت‌خان‌ش ه‌ع‌م‌ا‌ج لیل‌حت*, (Sociological analysis of gender quotas in Iranian higher education), Women Studies, N.1 Spring, 2017. <http://ensani.ir/file/download/article/20180210162239-9830-126.pdf>

⁹ *دندیم لی‌کشت نازز ار تلود نان‌کراک دصرد دن‌چ* (What percentage of government employees are women?) <https://www.donya-e-eqtasad.com/fa/tiny/news-3579339>

Despite persistent patriarchal political attitudes, women have participated into just as voters, but also as candidates in municipal, parliamentary and presidential elections. Nonetheless, the main political sphere in Iran is still completely male-dominated and women are not present in the key posts of political power¹⁰. In fact, to date, women have had no leadership role in any of the three fundamental organs of the Iranian political order, the Guardian Council *Shoraye Negahban*, the Assembly of Experts *Majles-e Khobregan* or the Council for the Discernment of Regime Interest *Majma-e Tashkhis Maslahat-e Nezam*. The absence of women from decision-making positions has been noted by different women activists and organizations in Iran across the previous three governments of Khatami, Ahmadinejad and Rouhani.

Women and Political System

With the end of the Pahlavi monarchy (1925-1979), following the 1979 revolution, women were systematically excluded from holding judgeships in the newly founded Islamic Republic of Iran. In 1934, during the reign of Reza Shah Pahlavi, the “judges’ employment law” was ratified in which there was no specific mention of the gender of the judge. In 1970, for the first time in Iranian history, five women were appointed as judges and worked in this position until 1979. It is important to note that the first draft of the 1979 constitution also does not specify the gender of judges or those who hold any other positions such as the head of the judiciary, attorney general and the head of the Supreme Court. It was only in 1982 that the Law Governing the Appointment of Judges was ratified and for the first time it was stated that only men could become judges.¹¹

¹⁰ Majles shoray-e Eslami (Islamic Parliament of Iran). At this article I use the name of “Majles” as parliament.

¹¹ Jamileh Kadivar, *Women Working as Judges and Making, Judicial Decisions*, Edited by, Tara Povey and Elaheh Rostami-Povey, *Women, Power and Politics in 21st Century Iran: Women and Executive Power*, Routledge, 2016. 108.

Through different resistance to change the situation by women, some conditions have improved and some positions in the judicial system have been unblocked for women in Iran. "Women can now work as advisors in other legal institutions such as the Supreme Administrative Court and as investigative judges at the Offices of Legal Studies and the Codification of Law in the Ministry of Justice. They can also work as advisors to legal departments and other departments which require judicial positions. Women are allowed to work as advisors in the special civil courts in relation to divorce and as judicial advisors in the family courts. Despite all of these reforms over the past decades, women still cannot make legal judgments or issue warrants and sign final verdicts.¹²

Since the Islamic Republic's founding, the number of women in the Majles has always been a very low percentage. Except for a slight rise - from the ranking drawn up during the World Economic Forum - during the period of the reformist President Khatami, the situation has remained unchanged since 2006.

Furthermore, there are no appropriate laws or facilities that support women at the managerial level in view of their family duties and their dual work in this regard. This patriarchal attitude toward women's responsibilities is one of the main reasons why women have been denied roles in high level jobs and the ability to hold key positions in society.

This is the context in which progressive women, during the tenth parliamentary elections in 2016, pursued their demand for a minimum female quota of 30 percent, which is still under evaluation by some political parties and male members of the Majles. Currently, the percentage of women present in the Majles has reached its all-time peak at 6%, with 17 female members out of 290.¹³

¹² Ibid. p. 109.

¹³ Interview with Azar Mansuri, *Political activist of the reformists: The role of women in*

Taking a step back, we must remember how Article 20 of the Constitutional Law supports all individuals, men and women equally, and emphasizes that all members of society, in relation to the principles of Islam, have equal political, economic, social, and cultural rights.

Iran, unlike some countries in the Global South, has a large cadre of educated, professional women capable of stepping into decision-making roles. Therefore, the fact that Iranian women are still largely excluded from positions of influence relates to the unequal division of Key roles in Iran's political power. This reality forces some Iranian women to accept society's limitations, even if they are well qualified for those careers. But in other job spaces for example during the Moderate President Rouhani in 2021, the engagement of the women in government management position increased from 12% to the 26%.¹⁴ and there was also a notable increase in female managers (up to the 36%).¹⁵

One of the strategies that women have achieved under resident Khatami for strengthening their presence and enhancing their voice inside the Iranian Majles was the foundation of the *Women's Commission* in 2000. The main effect of this commission has been and still is to limit the dominant male voice inside the Majles and concentrate on promoting women's and children's rights and their living conditions. This Commission found a degree of success when the Majority of MPs were in the hands of the reformists.

This Commission had four main priorities:

(1) Considering women's legal issues, including guardianship of children, Mahriyeh (marriage contract), divorce, re-marriage, and so forth;

political development. Part of the construction of power resists the political participation of women. <https://women.gov.ir/>, 2019.

¹⁴ IRAN News Agency *Ebtekar*: 26% of government management positions are held by women, irna.ir/xjDxZ8. 18/April/2021

¹⁵ ISNA News Agency, *What percentage of women sit at the management desk?* <https://www.isna.ir/news/99030402020/چندین-دانشجوی-مدیریت-در-مجلس-پن-انز-دستر-دند-چ> 25/May/ 2020.

- (2) Women's social issues and some social bans against women, such as a ban on leaving the country without the husband's permission;
- (3) Addressing cultural traditions that impede women's rights, particularly in specific areas in the country and among some ethnic and religious minorities, such as underage and forced marriage;
- (4) Women's economic issues, such as women's employment and retirement.¹⁶

Today, the Women's Commission is mainly in the hands of conservatives. The women's faction of the 11th parliament (2020) has a 5.5 percent share of Majles seats. Only eight of the country's 31 provinces have women representatives and just some independent Majles member has a specific socio-political agenda: review and approval of the bill to ensure women's security against violence and the spouse child (married under 18); pursue the goal of a 30% share of women in government management positions, which was a continuation of the plans of the female members of the 10th parliament.¹⁷

According to article 62 of the Constitution, the deputies of the Parliament and the president, as well as the representatives of the councils of provinces and cities are elected without regard to their sex. In fact, women have received the investiture from the Constitution and the possibility of being elected or appointed to the highest political and administrative positions in the country. This is a right that has led some women to run not only as representatives of Parliament, but also in presidential elections.

The only exceptional rule concerns the office of president. According to an interpretative clause of Article 115 of the Constitution, the candidate for

¹⁶ Samira Ghoreishi, P.139.

¹⁷ Zanan Magazine: «دینکیم هچ سلجم نازن نو یس کارف» (What does the women's parliamentary faction do?) <https://zanaan.com/featured/1400/5335/> 2021. Dey.

this role must be “rajol” (statesman), literally an “illustrious political and religious personality”. So far, however, this term has only been interpreted in a masculine sense: the candidacy of some women has been excluded - by the Guardian Council - without any explanation in some cases, or due to the lack of “necessary requirements” in others. “The interpretation of Islamic laws and regulations by the members of the Guardian Council and some Islamic jurists has in practice disqualified women from running for presidential elections”¹⁸. Considering also that according to Article 134 of the constitution, the president of the Islamic Republic is the second most important person after the supreme religious leader who currently is Ali Khamenei.

The issue of women’s participation in the political sphere took centre stage in a significant way during the 1997 presidential election: nine women attempted to run for the presidential elections, although their attempt was rejected by the Guardian Council, which disqualified women from competing with men for this position. This decision was followed by a debate on the lawfulness of this sentence and whether it was to be attributed solely to gender segregation.

Azam Taleghani, women’s rights activist and the daughter of Ayatollah Mahmoud Taleghani, was the first woman to present herself as a candidate in presidential elections. This opened up an important debate with the *Ulema* religious scholars and functionaries about a women’s right to run for president and other important political offices. Taleghani argued that,

¹⁸ Tara Povey and Elaheh Rostami-Povey, *Women, Power and Politics in 21st Century Iran: Women and Executive Power*

Jamileh Kadivar, Routledge, 2016, p. 121. “Since 1979 a number of women have signed up as presidential candidates; however, all female candidates have been rejected by the Council of Guardians (*Shoraye Negahban*). The Council of Guardians is the authority that is responsible for supervising all elections including the presidential elections and consists of six *faqih* (religious jurists) appointed by the religious leader and six laymen nominated by the head of the judiciary and approved by the *majlis*, the Islamic Consultative Assembly (the parliament)”.

according to *Shari'a* Islamic Law, there are no Islamic Injunctions against a woman becoming president”¹⁹. She never stopped her activities in this regard, and her actions helped open a new space in public debate over political equality for women.

Since 1997, Iranian women have developed various forms of activism, despite ongoing cultural, political and gender barriers. Women’s political participation was highlighted during Mohammad Khatami’s presidency. In 1997, 76% of Iranian women voted for Khatami who was and is, until today, the only candidate who ever offered a special plan for the improvement of women’s conditions²⁰. But despite the different approach to the matter, Khatami did not assign any women as minister during his two terms, and when he was asked why there were no female members in his cabinet of ministers, he replied simply that he didn’t want to lose any chances with such a choice.

However, following the inauguration of President Khatami in June 1997, reforms were implemented in all sectors, with a particular focus on strengthening the participation of women in socio-political activities, which has led to an institutional change approach to women’s rights issues.²¹

During that time, the Women’s Office, within the presidential office, which was later transformed into a Centre for Women’s Participation, played an extremely effective role in integrating gender perspectives into national decision-making. Alongside the activities of this office, the Women’s Committee in the Provinces has become active in the management of women’s issues within the infrastructure of the government’s decentral-

¹⁹ Homa Hoodfar and Shadi Sadr, *Islamic Politics and Women’s Quest for Gender Equality in Iran*, *Third World Quarterly* Vol. 31, No. 6, P. 895.

²⁰ See: Valentine Moghadam, Fatemeh Haghighatjoo, *Women and Political Leadership in an Authoritarian Context: A Case Study of the Sixth Parliament in the Islamic Republic of Iran*, Cambridge University Press, Cambridge 2016.

²¹ Heshamt Sadat Moinifar, *Participation of Women In Iran’s Polity*, in GEMC Journal, 2011.

ization policies.

Later, to regain female support for his government, Khatami appointed women to higher levels of the administration and decision-making roles and increased their political participation. Some examples of this trend include his selection of Masumeh Ebtekar as vice president and head of the organization for the environment in his cabinet. According to Article 124 of the constitution, vice presidents can perform the president's constitutional duties. Ebtekar was the first woman vice president in the Islamic Republic of Iran, and she was one of the founding members of the Iranian reformist political party, *The Islamic Iran Participation Front* and participated in the *Beijing* Congress in 1995.²² In addition to Ebtekar, Khatami also appointed Zahra Shojaee as advisor to the president and the head of the Centre for Women's Participation.

Of course, having the majority of seats in the Majles' in the hands of reformists also made possible more changes in favour of women's rights and living conditions. This ended by the time of the Seventh Majles (2004-2008), during which conservatives formed a majority with 54 percent of the seats while the reformists were in a minority with only 13 percent of the seats.²³ All women except one who entered the Seventh Majlis were from the Conservative faction and they demonstrate the "women against women" phenomenon and the status of women's rights and legal needs did not improve nor were they really considered in during this period.²⁴

The situation quickly changed with the arrival of conservative President

²² See the website: <https://shora.tehran.ir/Default.aspx?tabid=149>

²³ The defeat of the reformers was mainly because the Council of Guardians disqualified many reformist candidates. Many pro-reformists, moreover, boycotted the election. Considering in the previous Majles the reformists were in the majority and had 65 per cent of the seats. In 7th Majles the Women's Fraction which had been formed in the 6th Majles was also dissolved.

²⁴ Mehrangiz Kar and Golriz Farshi, *Focusing on Women in the Internal Politics of Iran*, *The Brown Journal of World Affairs*, FALL / WINTER 2008, Vol. 15, No. 1, pp. 75-86.

Mahmoud Ahmadinejad in 2005. There was a return to the idea of women as a mother and housewife to the detriment of her socially active role. With the coming to power of the ninth government, Ahmadinejad, in his first term as president, transformed the Centre for Women into the Centre for Women and Family Affairs and Nasrin Soltankhah was selected as the head of the centre. Ahmadinejad also included a few women as vice presidents and advisors in his administration, like Fatemeh Javadi who became a vice president and the head of the Department of the Environment.

In Ahmadinejad's second term, and particularly during the 2009 Iranian presidential elections, several women's rights groups were organized as a result of the desire to tackle the discriminatory policies of the Ahmadinejad era and revitalize women's rights and the status of women in Iranian politics. Amongst the central demands of most women activists was an increase in the accessibility of decision-making positions for women, including in the most important body on women's issues, *Jaame Zeinab* – the women's organization founded in 1986 by the conservatives and which was accepted by the Ministry of Interior as a political party in 1992. In the 2009 presidential election, 42 women were among the 475 candidates for president but once again all female candidates were disqualified by the Council of Guardians. They justified this rejection on the grounds of a lack of required skills for the job and not because they were women.

Despite this, in 2009, in contrast with his first term, Ahmadinejad appointed three women to his cabinet. This decision still surprises many in the political field, considering that the two more moderate presidents, who held the office before and after him failed to appoint any women to such high-level positions, despite many campaign promises. Following this decision, the secretary of the Islamic women's organization *Jaame'e Zeinab*, Zahara Naderi, explained that the move by the neoconservative president was "entirely foreseen, since Ahmadinejad was subjected to a lot of pres-

sure from women's groups and is the type of person who is likely to make bold moves".²⁵

Equally surprising was the decision of the conservative-dominated Iranian parliament to accept the nomination of Marzieh Vahid-Dastjerdi to the health ministry, who consequently became the first female minister of post-revolutionary Iran²⁶. Certainly, choosing a female minister, who belonged to the conservative camp, was an important step in the path of promoting and protecting the political rights of women in theocratic state. Nonetheless, during Ahmadinejad's presidency, the situation for women did not improve. Indeed, it has undergone a further deterioration, both at a social and work-related level, and the access to different university courses.²⁷

The other important reason that has led women to greater demands for participation in the country's politics has been the exponential growth of women's access to secondary education. The data show an increase in women's enrolment from 26% in 1990 to 67% in 2019. The access of Iranian women to the intellectual world and the change in the nature and strategy of their campaigns for equal opportunities and equal rights confirms this factor.²⁸

Thanks to access to digital tools and various social platforms, such as Telegram, Instagram and Twitter, awareness of the right to greater protection has spread. President Rouhani expressed the need for an urgent program to improve the status of women, particularly during his 2013 election cam-

²⁵ Mona Tajali, «Islamic Women's Groups and the Quest for Political Representation in Turkey and Iran», in *Middle East Journal*, Vol. 69, No. 4 (Autumn 2015), pp. 563-581.

²⁶ *ivi*

²⁷ Jalil Roshandel, Fatemeh Sadeghi, Shima Tadrissi, «Gender Equality and Empowerment in Iran: A Comparison between Ahmadinejad's and Rouhani's Governments», in *Journal of South Asian and Middle Eastern Studies*, Vol. 42, No. 3 (Spring 2019), pp. 35-53.

²⁸ See: Report on gender equality in higher education following the increase in the number of educated women <https://www.msrt.ir/fa/news/46613>

paign. In his first term as president, Rouhani pledged to “give equal opportunities” and “promote the rights of women.” Among the women who took up relevant positions between Rouhani’s first and second mandates, Masumeh Ebtekar, Iran’s Vice President for Women and Family Affairs, Shahindokht Molaverdi, Vice President for Women’s Affairs, and Elham Aminzadeh, Legal Vice President, should be mentioned. Despite this, he never appointed a woman to the cabinet of ministers, even after receiving the request of 157 Majles deputies to choose a woman as minister. This factor was among the main reasons for a strong dissatisfaction among women voters, aware that their action would serve to elect yet another male figure.²⁹ Rouhani’s government stated from the outset that “the plan was to give 30% of the government’s middle and senior cadres to women.”³⁰ Starting from a quota of only 5%, today Iranian women have reached 26%.

The results of political and social studies of Iranian society show that currently the needs of women as citizens of society are not recognized. The demands of women in Iran today are different from even twenty years ago, due to the increase in their level of education and awareness. If the social and political structures do not adequately respond to this collective question, they will face a deep rift.

Women’s eligibility to run for president and the resistance of an ambiguous concept such as “men politicians” in the Constitution clearly show the gap still existing between the legitimate request for political participation of women and the official version of the Constitution. This controversial problem is brought as a justification by conservative factions that want to curb the female push towards greater political participation. Today the question that public opinion is asking is whether the role of women in politics is limited only to voting.

²⁹ See: Fatemeh Bezhan, “*Special Circumstances*” behind Dearth of Women in Iran’s Cabinet, 2013, 21 August, <https://www.rferl.org/a/iran-lack-of-women-incabinet-/25081794.html>

³⁰ Azar Mansuri, *ivi*.

At the same time, governments have the power to increase the participation of women in politics by adopting new procedures and regulations. Rouhani himself was able to achieve a 25% female presence in the middle and upper management sphere of the government.

In the 10th Majles, the number of female candidates increased from 8% to 11% and the number of female members went from 9 to 17. One of the reasons for the increase in political participation of women in the parliamentary elections of the 10th and 11th Majles is the 30% quota set by some parties for women on their electoral lists. This choice by parties is a strategic one. In fact, an increase in the number of women candidates is proportional to the increase in the number of women who go to the polls, with a consequent increase in the number of votes.

Finally, for the first time in the history of the Iranian Majles, the percentage of female deputies has increased from 3% to nearly 6% and the average age of these women has decreased from 48 to 42, which indicates national confidence in younger women. In the Iranian parliament, in general, women's participation is treated like that of a minority group. The progress towards improvement in women's socio-political situations, however, is still in the hands of the male dominated majority of the Majles Assembly. Some laws, in particular proposed by the women faction of the Majles, were not adopted due to the lack of the necessary majority. One of the most controversial and debated plans of this parliamentary group, for example, was to raise the minimum age of marriage. The women's faction sought to raise the legal age of marriage from 13 to 16 for girls and to 18 for boys. The plan eventually stalled due to "incompleteness" in the Judiciary Commission.

Period	Parliament Dates	female PMs	Total number of PMs	% Female MPs	% Voter turnout	President
1st	1980 – 1984	4	327	1.2%	52.1%	Ali Khamenei
2nd	1894 – 1988	4	274	1.4 %	64.6%	Ali Khamenei
3rd	1988 – 1992	4	278	1.4 %	59.7%	Akbar Hashemi
4th	1992 – 1996	9	275	3.2 %	57.7%	Akbar Hashemi
5th	1996 – 2000	14	277	5.0 %	71.1 %	Mohammad Khatami
6th	2000 – 2004	13	297	4.3 %	69%	Mohammad Khatami
7th	2004 – 2008	13	294	4.4 %	59.5%	Mahmoud Ahmadinejad
8th	2008 – 2012	8	288	2.7 %	55.4%	Mahmoud Ahmadinejad
9th	2012 – 2016	9	288	3.1 %	64 %	Hassan Rouhani
10th	2016 – 2020	17	290	5.8 %	61.5%	Hassan Rouhani
11th	2020 – 2024	16	290	5.5 %	42.5%	Ebrahim Ra'isi

Other hotly contested plans of the Rouhani government, which did not have a majority of votes in Majles, included an increase in penalties for acid attacks against women, tackling the need for male permission for women to leave the country and establishing a pathway for women to pass on citizenship to their children. The latter was the most controversial plan

carried out by the women's faction of the 10th Parliament and paved the way for the drafting and approval of the law on "citizenship of the children of Iranian mothers and non-Iranian fathers", which specified the duties towards 1.5 million children without birth certificates, born from the marriage between Iranian mothers and non-Iranian fathers. This provision was passed by the 11th Majles in 2021.

Iranian women activists have also worked to create greater space for women inside Iran's political parties. The parliamentary system in Iran is not based on the political party system, but the main two factions in the Majles are: *Eslah-talaban* the reformists and *Osul-garayan* the fundamentalists or conservatives, both include more than 110 different official political parties.

One of the places that could improve the facility to engage women in political activities is the House of Parties *Khaneh – e Ahzab* which was forced to close during the Ahmadinejad presidency in 2005 and reopened during the Rohani presidency in 2015. This organization mainly provides a space and place for official parties' activity, combining by 3 factions of reformists, conservative and independents, that aims to be a successful model of coexistence of the country's political currents³¹.

The House of Parties' work is in trade unions and is not political, in other words, it defends the culture of collaboration, the rights of parties, and free space for the activities of parties. That is, the House of Parties is a place of interaction, a bridge between the government and the parties.

The role of the House of Parties is to defend the political parties themselves, to defend the rights of the parties in the form of a trade union. The Council of *Khaneh – e Ahzab* includes 21 members, two of whom are women. Women have their own committee and try to raise the number

³¹ <https://www.icana.ir/Fa/News/277728/>

of women at this council to at least 7 women members.³² The Women's Committee of *Khaneh – e Ahzab*, chaired by Fatemeh Rake'i, is working towards the goal of at least 30% women in every political party. In fact, Shahindokht Molawardi, Vice President for Women and Family Affairs, appointed in 2016, highlighted that just 18 secretaries-general of political parties in Iran are women, out of a total of 242³³ parties that are formally licensed by the Article 10 Commission³⁴. It is important to note that women reformists and parliamentarians of the reformist factions tried hard to expand social and cultural institutions in order to meet women's demands, but conservative MPs strove to stop these reforms in favour of women. They tried to reframe a woman's role as a provider of family support, being a good wife and mother and staying at home. The role of Iranian women and their emancipation in the socio-political sphere was and still is challenged by the different political groups. It is clear that they faced more obstacles when the political power in the Majles and the Presidency was in the hands of the conservative faction.

CONCLUSIONS

To conclude, there are several factors that have a direct influence on women's participation in politics in Iran. Social and political barriers have a considerable weight, as individual and social renewal plays an important role in increasing the political and social participation of women and in the development of society. Widespread access to education is a fundamental factor in limiting the barriers to women's political participation. Through

³² <https://www.borna.news/fa/tiny/news-598232>

³³ Iran News Agency: ۱۱۰ تسه لاعف روشک رد یمسر بزح (There are 110 official parties in the country) irna.ir/xjvBLy. Until 2019, 250 parties were licensed in the country, but out of this number, according to the new law on "how political parties and groups operate" because they either did not function or did not form a general assembly, 110 parties became official and legal while the other parties have not yet been able to comply with this law.

³⁴ Iran News Agency: ۷ درصد تسه هانز نارپارد بازح دصرد (7% of parties in Iran are women!) irna.ir/xjj6dz

continuous awareness of women's rights, the unrealistic perception of a certain paradox between women's family roles, on the one hand, and their social, political, and managerial roles, on the other, improved the women's capacity to play the important roles also in the political sphere even with the different barriers. Implementing a quota of 30% of the seats reserved exclusively for women within the current Iranian political system has the best chance of enhancing political participation for women.

In Iran, through education, the points of view of the individual, man or woman, regarding social participation are improved, and the opportunity to accept sharing with women in decision-making and management affairs is gradually realized.

In short, political, and social awareness can be taken as the root of growth in human societies through education and training, which can consequently lead to an increase in the social and political participation of women. At the same time, the role of the media and social networks should not be ignored in the elimination of barriers to women's participation; just as an imprecise interpretation and understanding of Islam is a cultural factor that hinders the participation of women and keeps the rest of society from achieving the goal of making the country more inclusive. Of course, what the reformist women have aimed to do for changing the conservative male centred reading of Islamic laws should be continued.

Covid-19 Impacts and Challenges to E-Learning in Modern Universities: The Experience of UARD

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ABSTRACT

The rise of the COVID-19 pandemic rendered tremendous impacts on the whole society and has changed and still changing our lives for years. One of the most discussed problems concerns physical health, economies, social issues, relations, etc. and not least - the new developments in the educational systems targeting innovative e-learning and distant learning solutions and their implementation. In this context, the higher education system is experiencing a transition trying to maintain the needed effectiveness and quality of training which affects all the involved parties.

Current paper makes a short overview of modern challenges to the Bulgarian higher education system and presents the experience of the University of Agribusiness and Rural Development in undertaking the transition to a new e-learning system in the times of coronavirus pandemic. Recommendations and implications on future challenges and development are provided concerning the opportunities for combining e-learning with auditoria load, practical trainings and functioning of the quality assurance system.

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Keywords: *Coronavirus, Pandemic, Crisis, Education, E-Learning.*

INTRODUCTION

In recent years, the higher education system in the Republic of Bulgaria has undergone significant changes under the influence of a number of external and internal factors, some of which were further intensified by the COVID-19 pandemics.

The Strategy for the development of higher education in the Republic of Bulgaria for the period 2021 – 2030 defines a number of challenges arising from changes outside the field of higher education (HE) in the Republic of Bulgaria as follows:

- ✓ *Accelerating dynamics of the labor market in the new social and economic environment*

In recent years, there has been an accelerating and difficult to predict labor market dynamics. Technological changes and the speed of innovation significantly change the requirements for the competencies necessary for the labor market. A number of traditional professions are disappearing and new ones are appearing, with an increased demand for professions requiring high analytical and social skills and non-routine professions in the field of service and social support. The competition for labor and talent today is global. All these processes are accompanied by an increase in social inequalities on a global scale and difficulties in including certain groups in the labor market.

Main challenges related to the accelerating dynamics of the labor market:

- ✓ Mismatch between the needs of the labor market and the nature of the training received in higher education in terms of both knowledge (need for interdisciplinary knowledge and interdisciplinary training) and skills and competencies (need to focus the educa-

tional process on the acquisition of analytical, digital and social competences).

- ✓ The need to create a permanent and effective mechanism for timely changes in curricula in view of the dynamic labor market and social development.
- ✓ Need to develop more flexible forms of education, as well as forms of training with the active participation of business representatives.
- ✓ Lag in time and lack of flexibility in the introduction and management of modern disciplines and specialties.
- ✓ The need to promote lifelong learning as a priority in the development of higher education.
- ✓ The need to ensure high qualification of the entire academic staff by constantly updating the knowledge, skills and competencies of teachers.
- ✓ *Increasing the role of science and innovation for the development of a competitive economy and for solving social problems*

Higher education has a particularly important role in these processes in several aspects - developing new knowledge, using existing knowledge to develop innovations and competitive technologies, forming an entrepreneurial spirit, supporting companies, administration and politicians to competently and scientifically sound solutions to the challenges they face.

- ✓ The need to develop human and material resources in universities, taking into account their traditions and regional characteristics, to provide the necessary base, knowledge and skills for the development of science and to solve important scientific and applied research problems in different areas of economic and social life.

- ✓ Need for activation of the scientific and scientific-applied activity in the higher schools through additional development and appropriate balancing of the institutional, program and competitive forms for public financing, as well as of the project activity with company financing.
- ✓ The need for full implementation of the rules of scientific ethics and the principles of transparency, open science and open innovation.
- ✓ Need to stimulate more active involvement of teachers and students in solving practical problems, which requires a variety of mechanisms and incentives, incl. by using target criteria for academic growth, improving the rules for salary formation, removing obstacles to private funding of applied research projects, regulating mixed public-private funding of doctoral students, etc.
- ✓ Need for introduction of quality practical training in innovation and entrepreneurship in all professional fields to build an entrepreneurial culture in the next generations of professionals.
- ✓ Improving the mechanisms for planning, management and coordination of the scientific and innovation process, as well as the tools for sustainable and effective development of the Bulgarian scientific and innovation ecosystem.
- ✓ *Universal digitalization and development of educational systems that complement or are alternatives to classical higher education*

The need for urgent digitalisation of education, caused by the outbreak of the COVID-19 pandemic in 2020, only illustrates how urgent and important changes are in higher education and in all other spheres of life in this direction. What seems to be imposed by an emergency today may turn out

to be a widespread practice in the coming years. At the same time, digitalization does not eliminate the need for direct personal contact between the teacher and students - it rather changes the goals and content of this contact (eg ways of exchanging, analyzing and interpreting information), and hence modifies the roles of participants and its organization.

In recent years, digitalization has become a key tool for providing access to better HEIs, for greater internationalization and for modernizing teaching methods in line with the attitudes and interests of the younger generations. Digitalization, if implemented correctly and with the care of the student, can address one of the most difficult problems of modern higher education, namely to provide quality education at lower costs, which are within the capabilities of a much larger number of students, with different social backgrounds.

✓ *Intensifying the global supply of higher education services (European Higher Education Area)*

The European Higher Education Area seeks to promote and stimulate mobility and cooperation in the field of education and training and to assist the EU Member States in modernizing their education and training systems.

✓ *Population aging and changes in the age structure*

- ✓ Reducing the number of prospective students.
- ✓ Reducing the criteria for admission to higher education.
- ✓ Lowering the criteria for students during the training due to the mass admission and hence - the quality of education.
- ✓ Need to orient the candidate student campaigns and the overall organization of higher education not only to the immediate graduates of secondary schools, but also to non-traditional learners through

the development of forms of lifelong learning, dual education, opportunities for combining learning and work and / or family commitments, etc.

✓ *Change in the role, goals and functions of higher education*

Today, universities around the world face challenges that affect not only their functioning but also their very identity as institutions. The development of information technologies, the transition from elite to mass and even universal higher education, the rapidly changing and open labor market cause changes in the role and functions of higher education.

Differentiating the mission, profile and territorial significance of higher education is seen as a means of adapting to the growing and increasingly diverse labor market requirements for a highly skilled workforce. In some cases, however, the purely instrumental role of higher education is affirmed and it is subordinated entirely to the needs of the labor market. This diminishes the role of higher education as a scientific and spiritual institution, which at the same time has significant general social functions.

The traditional model of higher education, based on classroom classes, faces serious competition from mass open online courses (MOOCs), as well as educational programs and practice-oriented courses offered by various platforms and organizations.

- ✓ Lack of clarity in the strategic visions of higher education institutions regarding their main functions related to education and training, the development of basic and applied research, innovation and entrepreneurial skills and the social responsibilities of higher education (including national, regional and European).
- ✓ Difficulties in achieving a balance between the growing and different in nature social requirements for and expectations from higher

education.

- ✓ Insufficient competitiveness in terms of rapid development of the market of educational services and lack of sufficient flexibility in the proposed forms of education.

Strategy for development of higher education in the Republic of Bulgaria for the period 2021 – 2030 determines the following challenges arising from processes within the field of higher education in the Republic of Bulgaria:

- ✓ *Lagging behind the trends in European higher education and weak internationalization of Bulgarian higher education*
- ✓ Insufficient international prestige of the Bulgarian universities and lack of recognizable competitive advantages of the Bulgarian higher education.
- ✓ Low intensity of scientific research, which leads to the achievement of internationally visible scientific results.
- ✓ Increased interest of Bulgarian high school graduates to study abroad.
- ✓ Insufficient effectiveness of existing contracts for joint programs with foreign universities.
- ✓ A small number of offered specialties and programs in a foreign language and in distance learning in many universities.
- ✓ Legislation that does not fully take into account the specifics of distance learning, which makes it difficult to attract foreign students in this form.
- ✓ Relatively small number of participations in international research projects and networks.

- ✓ Insufficient skills to work in an international environment by some teachers and some administration in higher education.
- ✓ Insufficiently effective and often formal implementation of the instruments of the Bologna process, incl. the European credit accumulation and transfer system and opportunities for academic mobility.
- ✓ Quality and access to education in the conditions of mass HE and demographic crisis

The need to combine the mass HE as a global trend that has proven its benefits for the development of the economy and society, with an effective system of incentives and restrictive measures to continuously improve quality, taking into account the specifics of goals, motivation and opportunities of students. As a whole, there is a lack of measures for solving the financial and social problems in some HEIs, which arose as a result of the reform, as well as measures for optimizing the network of HEIs in the country.

- ✓ *Lack of compliance with the needs of the digital generation and with the competencies necessary for successful implementation in the conditions of technological revolution*
- ✓ Educational systems find it difficult to adapt to rapid changes in technology - not only in terms of how technology is used, but also in the teaching of skills and teacher training.
- ✓ Lack of methods for assessing digital skills.
- ✓ The current education system does not support (from an early age and throughout life) a well-balanced set of skills and competencies that guide citizens to the useful interaction between relevant digital and life skills, as well as to key competencies, in particular personal, social and entrepreneurial skills).

- ✓ The digital transformation of production and service technologies is not accompanied by educational reform that will allow citizens to make the transition to new professional and social roles.
- ✓ Citizens are not prepared for lifelong learning in a world that is changing faster and more digital.
- ✓ Very high capacity broadband networks, cybersecurity and artificial intelligence are not yet the basis for future forms of education and training.
- ✓ Massive lack of basic information protection skills to avoid the risk of fraud and fake news online and on social networks.
- ✓ *Insufficient support and insufficient development of research as an integral part of higher education*
- ✓ Need to include research as an integral part of the learning process through its various forms - conducting experiments, theoretical and computer modeling, design and implementation of prototypes, communication for specialized and non-specialized audiences, etc.
- ✓ The need to improve and strengthen the role of the system of objective indicators for evaluation of scientific and applied research activities of higher education institutions and researchers, in accordance with the specifics of the respective scientific field.
- ✓ Need for intensification of the international exchange of students and teachers for exchange of ideas, methods and experience, as well as for conducting joint research with partners from leading scientific institutions.
- ✓ Constant development in terms of efficiency and volume of the various forms of financing the scientific and innovative activity

- institutional, program, competitive, through public-private partnership, financial instruments, etc.
- ✓ Development and implementation of policies for open access to the results of publicly funded research in order to promote them and their widespread use.

Among other challenges there should be also mentioned the following: difficulties in the selection, development and motivation of teachers; challenges related to the management of HEIs; need for effective and objective accreditation, as well as to recognition procedures; incomplete involvement in the development of economic centers in the country; development of the quadruple helix: university-industry-government-public environment, etc.

The Strategy for development of higher education in the Republic of Bulgaria for the period 2021 – 2030 defines the following vision for the development of higher education in the Republic of Bulgaria: *Development of a differentiated and flexible system of higher education institutions that function as successful partners and competitors of European universities and fulfill an educational, research and cultural mission for the benefit of society and individuals by conducting basic and applied research and by providing quality, accessible and lifelong education and training for successful personal, professional and social realization. Building an academic community that shares common principles, values and moral norms.*

The priority areas for the development of higher education are:

- ✓ Improving the quality of higher education by updating the content, methods and forms of education;
- ✓ Accelerated modernization and digitalization of educational ap-

proaches, methods and practices;

- ✓ Providing access to higher education and lifelong learning with high quality, which supports personal development and professional realization;
- ✓ Development of basic and applied research, innovation and entrepreneurial skills of students and teachers, and transformation of research and innovation into an integral part of higher education.
- ✓ Full use of the scientific and innovative potential of higher education institutions and increasing their role for accelerated economic development and for solving important social problems at national and regional level;
- ✓ Accelerated internationalization and full integration into European educational and research networks;
- ✓ Attracting quality motivated young teachers for renewal and development of the academic staff.
- ✓ Improving the structure, management and accreditation system of higher education institutions.
- ✓ Ensuring financial sustainability of higher education institutions and financial incentives for the development of quality education and research;
- ✓ Ensuring transparency and accountability in the management of the system and in higher education;
- ✓ Ensuring partnership with other scientific organizations in Bulgaria for conducting basic and applied research at a high level and for general educational programs.

The specific goals for the development of higher education in the Republic of Bulgaria by 2030 are:

- ✓ Development of a sustainable mechanism for updating existing and creating new curricula;
- ✓ Introduction of modern, flexible and effective forms and methods of training;
- ✓ Improving the organization and effectiveness of education in higher education;
- ✓ Internationalization of higher education and inclusion in international educational and scientific networks;
- ✓ Stimulating the participation of young teachers;
- ✓ Activation of scientific activity in higher schools;
- ✓ Building an effective education-science-business relationship;
- ✓ Increasing the role of HEIs as an active factor for regional development;
- ✓ Improving the management of HEIs and the evaluation and accreditation system;
- ✓ Improving the structure and efficiency of higher education.

Current paper will present part of the experience of University of Agribusiness and Rural Development (UARD) in the conditions and challenges, as described above, focusing on the impacts of the coronavirus pandemics from last year till now and the changes in the application of e-learning, assessed by the opinions of UARD students.

RESULTS AND DISCUSSION

University of Agribusiness and Rural Development (UARD) has a great experience in e-learning and distant learning (having a center functioning for more than 20 years), especially through the work under a number of projects implemented under Erasmus and Erasmus+ Programs (Additional information: <http://uard.bg/en/pages/view/30>). The last showed successful applications of e-learning systems in training, particularly in lifelong learning. Furthermore, along with the main campus in Plovdiv, UARD has a network of branches and local centers for distant learning all over the country.

Considering this experience, in 2020, after the COVID-19 outbreak and first wave in the spring, in September for the new semester UARD changed its e-learning system implemented through the information services system (<http://isao.vuarr.com/>) to a new one which is Moodle-based and it was named UARD E-university: <https://uni.e-uard>.

Moreover, since November 2020, UARD has started the implementation of a new Erasmus+ project under the initiative of European universities, namely the European University Alliance Innovations for Regional Sustainability (INVEST) - <https://invest-alliance.eu/>. INVEST will be developed as a new model of a European university applying the following innovative concepts: INVEST Virtual campus, EDUC8EU and Living labs.

Thus, e-learning and virtual mobilities will be in the focus in next years and the university tries to find the best solutions for assuring the necessary quality of training and to improve the existing practices.

In February 2021, after nearly one year of e-learning for all the students (studying from distance, from their homes, without any personal physical contact with teachers in the university, a study was performed through a structured questionnaire in the UARD E-university embracing 110 stu-

dents in the second year of their study in the following Bachelor programs: Business management, Finance, Accounting, Agrarian economy, Agribusiness management.

The first two questions were about the e-learning and its application. Most of the students (68%) think that e-learning is a good alternative during the COVID-19 pandemics but should not be applied out of emergencies (Fig. 1). 66% state that it should be applied in combination with traditional forms (Fig. 2). A lower number of students consider e-learning as the future of higher education that could be applied not only in emergencies – 32% (Fig. 1), 31% point that it can be applied alone, #0% - it should not be applied in higher education at all (Fig. 2).

According to the students' opinion the advantages of e-learning are connected to the facts that it saves money and time and it provides more opportunities for self-preparation (Fig. 3), and disadvantages – mainly in the lack of the personal contact and the difficulties experienced in carrying out practical training (Fig. 4).

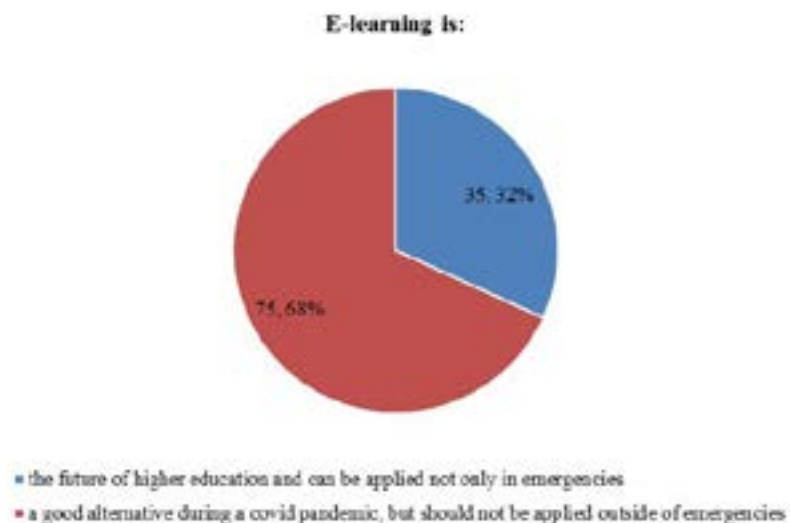


Fig. 1. What is e-learning and the future of training?

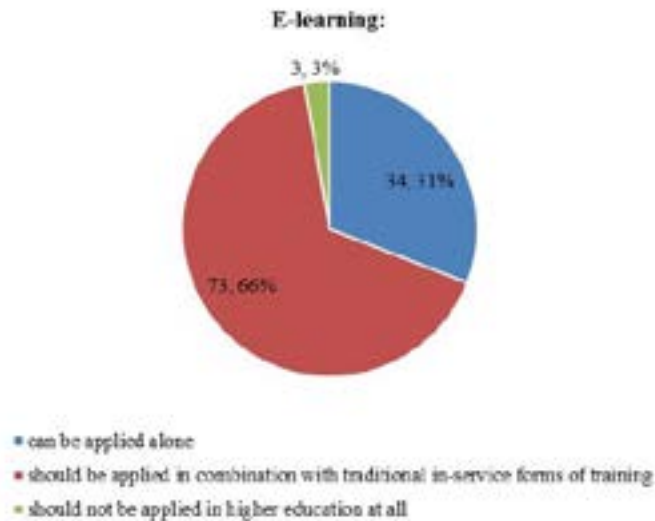


Fig. 2. The application of e-learning and traditional learning methods

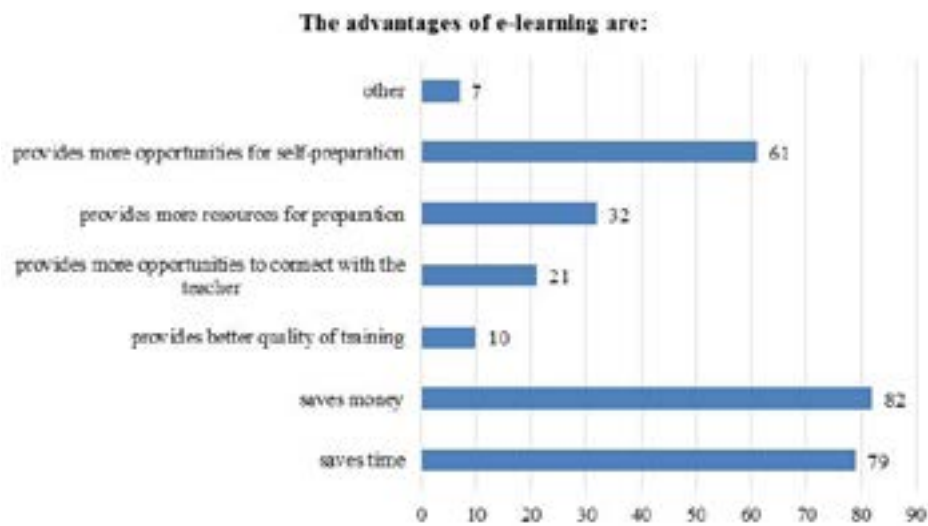


Fig. 3. Advantages of e-learning

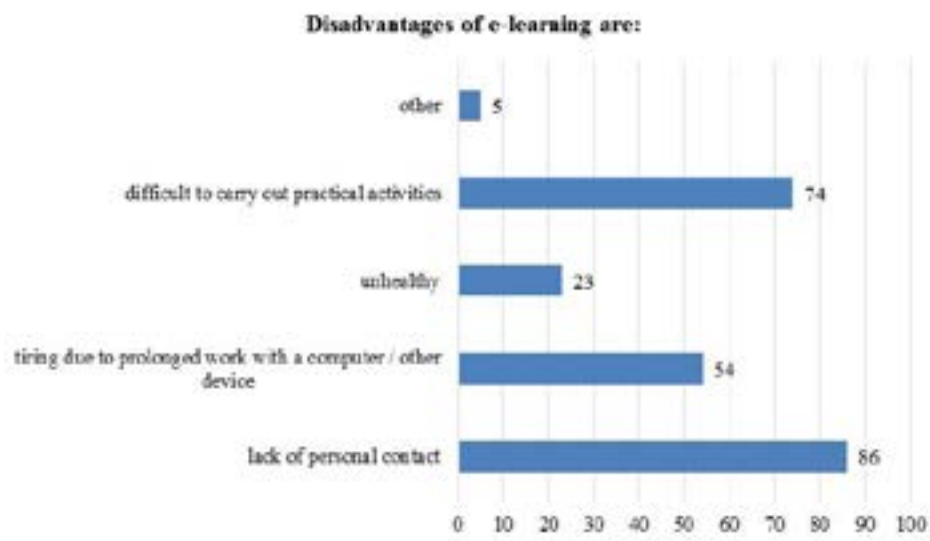


Fig. 4. Disadvantages of e-learning

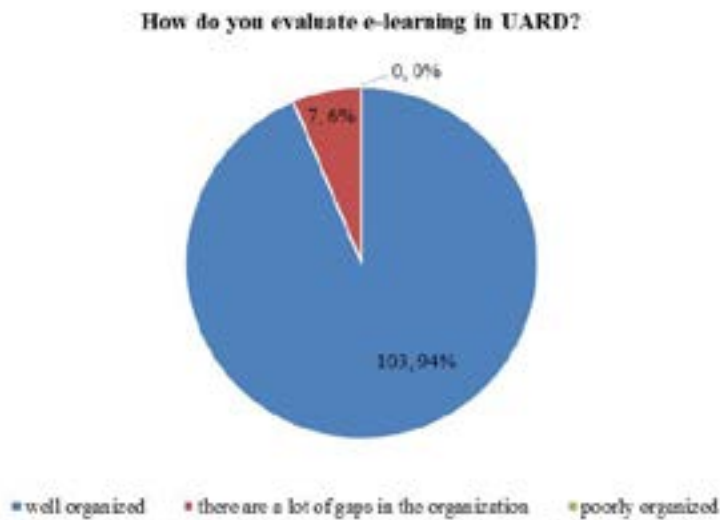


Fig. 5. Organization of e-learning in UARD

If you had a choice, would you enroll in all disciplines in e-learning forms from distance?

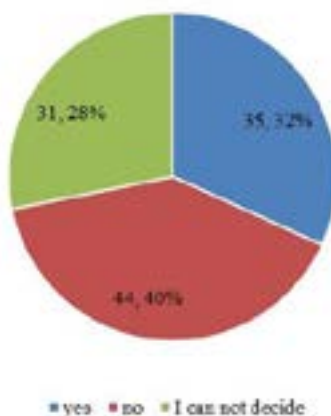


Fig. 6. Choice of enrollment in e-learning

Most of the students think that e-learning in UARD is well-organized – 94% (Fig. 5) but if they had a choice, it will be difficult to decide about taking all the disciplines in the e-learning form (Fig. 6).

The open question about what students liked in e-learning showed the following main statements:

- ✓ saving time and money for transport, etc.;
- ✓ accessible platform;
- ✓ convenience is that we do not have to travel to the university and we have more time to prepare;
- ✓ teaching, the assistance of administrators;
- ✓ good organization;

- ✓ lecture recordings that can be viewed at a convenient time;
- ✓ the combination of work and study;
- ✓ learning from home;
- ✓ opportunity to take care of children at home;
- ✓ more materials and preparation time;
- ✓ the ability to organize time independently;
- ✓ more opportunities to focus;
- ✓ the possibility of training in a pandemic.

The open question about what students didn't like in e-learning presented the following opinions:

- ✓ lack of personal contact with teachers and students;
- ✓ technical problems that arise;
- ✓ quite tiring sometimes;
- ✓ difficulties in practical activities;
- ✓ lack of direct communication;
- ✓ lack of a sense of "student" life;
- ✓ more stressful;
- ✓ there are none;

Additional opinions, comments and recommendations were:

- ✓ very convenient
- ✓ more practical assignments

- ✓ improvement in planning regarding time
- ✓ some organizational issues to be solved
- ✓ not suitable for a permanent use
- ✓ more interactive materials and training
- ✓ to be combined with some in-place trainings (“physical”)
- ✓ a good platform
- ✓ when out of coronavirus to turn back to traditional forms
- ✓ teachers are very responsive
- ✓ e-learning is not a full-fledged alternative to the traditional learning in auditoria
- ✓ based on the personal motivation for learning and development
- ✓ no recommendations.

Summarizing, the results of the study show a very good acceptance and understanding of the application of e-learning in the situation of the coronavirus pandemics and a certain extent of will and readiness to continue with e-learning forms but at the same time the lack of the personal contacts with teachers and students in auditoria and the difficulties with practical work need additional implications, incl. in the terms of quality assurance and accreditation.

CONCLUSION AND RECOMMENDATIONS

Discussing the future development of higher education institutions in Bulgaria, and UARD in particular, in times of COVID-19 but also in the realities of Society 5.0, some of the most important modern challenges in the development of the higher education system in Bulgaria should be con-

sidered: dynamics in economic and social environment; labor market requirements; increasing role of science and innovation for the development of a competitive economy and solutions for social problems; digitalization processes and development of new educational systems; European higher education area and the global supply of educational services; aging population and demographic issues; change in the role, functions and goals of the higher education system; career development and motivation of staff; management of higher education institutions; accreditation procedures; recognition procedures; the quadruple helix: university-industry-government-public environment, etc.

The new vision imposes the elaboration and the implementation of a new sustainable mechanism for improvement of existing and development of new programs and curricula; modern, flexible and effective methods of training; raising quality of training and access; internationalization and inclusion in international educational and scientific networks; motivating young teachers / scientists; encouraging R&D and innovation; education-science-business relationship; HEIs as a factor in regional development; management and accreditation issues, funding; structure and effectiveness, responsibility and transparency; flexibility, life-long learning; common principles and values, etc.

What will be important in the near future (as the world will not be the same as before) is to search for ways to combine e-learning with auditoria load and to organize practical trainings. Some of the most significant questions will be connected to the satisfaction of students, teachers, administrative staff and all other interested parties in business and society, especially regarding the problems of quality assurance.

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Nationalism: A Very Short Introduction¹

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Steven Grosby's significant contribution to the nationalism studies, *Nationalism: A Very Short Introduction*, underlines the historical process of nation (then nation-state in Europe) construction cycles across the world. Hence, it is a classic in terms of its comparative analysis among distinct societies, countries, and tribes by focusing on essential similarities of different communities on the road of their nation-building experiences. One of its main focuses is about the relation between the process of the emergence of nations and individual liberalities (p. 5). In other words, Grosby discusses the concept of nation as a threat against individual rights and liberties in different societies. Thus, the book is not just a chronological history book on nation, it also has debates on political philosophy.

Grosby also refers to his expertise, religion and nationalism, in the conceptualization of nation, and he distinguishes nations and nationalism and indicates the sharper role of religions, especially Abrahamic religions, on nation and nationalism. Furthermore, he underlines the ancient origins and discussions on nations to draw a clear theoretical and chronological

¹ By Steven Grosby, Oxford and New York: Oxford University Press, 2005. Pp. 142, \$11.94, ISBN: 978-0192840981.
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framework for distinct nations (or nation-states) in order to demonstrate unique formation stories of distinct nations across the world. On the other hand, he lists certain similarities on the process of nation-building to show a pattern in nations and nationalism studies in order to display the essence of identity politics: national self and national other.

There are eight chapters in the book, and consecutively: “The problem”, “What is a nation”, “The nation as social relation”, “Motherland, fatherland, and homeland”, “The nation in history”, “What god is mightier”, “Human divisiveness”, and “Conclusion”. Each chapter is interconnected with each other, and each chapter aims to display how the concept of nation is a social construct through socialization processes of district groups and communities in history. He notes that nation is the most concrete form of “social relations of kinship” (p. 42) because “nations are human creations” (p. 27) that centralize family. He gives different examples from Greek, Latin, Arabic, and Hebrew communities, and he demonstrates the pattern of territory and tie of loyalty for an over-arching umbrella, nation, even among religiously and traditionally different lands.

Grosby utilizes historical and religious texts, classic theoreticians’ ideas from the nationalism studies, and historical-anthropological studies to demonstrate supreme characteristics of the concept of nation. He especially concentrates on the importance of monotheisms (i.e. Colossians, p. 95) and their purpose to create a cement among distinct ethnic groups to constitute over-arching national identities. Hence, readers can clearly understand the direct relation between religion and nation.

Furthermore, he highlights the previous race-based studies on nations, and demonstrates “culture as an explanation” (p. 99) while studying and analysing the construction process of nations. He argues that culture and its distinctiveness among various groups, especially in the nexus of Orient and Occident, “might be exaggerated” (p. 101) since he conceptualizes

those distinctiveness as historical differentiations for the sake of survival across the world. Therefore, Grosby's book also challenges the argument of "Clash of Civilizations" by looking at differentiation processes of distinct cultures (interchangeable with nations in this context) and by demonstrating material and pragmatic reasons of differentiations, instead of primordial narrations. Overall, Grosby's *Nationalism: A Very Short Introduction* became an indispensable handbook to understand historical essences of nations in distinct communities and affiliations while discussing the social roots of nations through nuanced differences and religious perspectives.

EVALUATION OF THE SOCIO-ECONOMIC IMPACT OF GENERATION Y ON HUMAN RESOURCES¹

** SIMAAY ÇANAKÇIOĞLU

* Dr. Murat Adil SALEPÇİOĞLU

ABSTRACT

With this study, it is aimed to determine what employees in Generation Y (generation) think about job satisfaction and what they do satisfy them in their work. Accordingly, 2 questions about job satisfaction were applied on 20 people using unstructured in-depth interview technique. The data obtained by the in-depth interview method were grouped according to the subtopics identified and evaluated by associating them with the answers of the people interviewed. When the data obtained were evaluated, it was determined that wage, education and development were promoted and promoted in the first places in generation Y job satisfaction elements. In this respect, when the socio-economic projection for the next 10 years is evaluated, it has been determined that the business satisfaction elements of generation Y are the support of wages, education and development in the first place.

Keywords: Generation Y, Generations, Human Resources Management, Job Satisfaction, Education and Development.

¹ This article is based on the Master's Thesis titled "Evaluation of the Socio-Economic Impact of Generation Y on Human Resources and a 10-Year Projection".

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1. INTRODUCTION

Deciding on a profession is a challenging situation for most of the people. Young individuals are overwhelmed by this difficulty once they graduate and step into the professional life. Especially common among the university students, this situation leads to an anxiety and low self-esteem for the individual (Vianen et.al., 2009: 298)

Career choice is usually a one-time and the most critical decision a person makes. Henceforth, before making this decision it should be thoroughly thought taking into account many variables. The most important factors in career choice; (1) being able to clearly recognize your strengths, weaknesses, abilities and areas of interest, (2) being aware of the field of study for the career you plan to choose, the necessary conditions to be successful in the career in question, and the advantages and disadvantages of the career you will choose (Perkmen, 2009: 119-120).

In order to correctly explain “strategic” human resources management, we must first mention the differences between human resources management and strategic human resources management concepts. In human resources management, functions are evaluated independent of each other and from the business strategy. For example; When it comes to effectively discussing the performance evaluation system, how the system and the personnel selection system can be unified and their relation is not taken into consideration. Alternatively, today “strategic management” concept comes to the forefront. (Wright and McMahan, 1999: 51). Once the importance of this concept is realized, the necessity to associate each functional area related to human resources management with business strategy has emerged. At this point, concepts such as “strategic selection and deployment”, “strategic evaluation”, “strategic awards”, “strategic development” came to the fore (Fombrun et.al., 1984; Galbraith and Nathanson, 1978). In this con-

text, strategic human resources management, which evaluates the relations between organizational strategies (e.g., human resources management policies, practices, systems, etc.) and organizational activity and approaches the processes from a wider perspective, has started to gain importance (Chadwick and Cappelli, 1999; Way and Johnson, 2005: 3, in Wright and Sherman, 1999).

Having the largest share in global labor market in recent years, the tendencies of the generation Y is under the influence of the developments both as a result of the business requirements and intended for the future of the business during this transformation process. Especially with the increase in importance of the generations in the last 10 years, the expectations of the generation Y have increased and strategies aligning the expectations with the enterprise objectives have been created in the foreign and local literatures. In this study, we examine the trends in employment services in the country and global level by determining the expectations of the unemployed from the business life, and the expectations forming the generation Y, which shapes the future of the business.

Once the expectations of the generation Y about the working life are determines, these are transferred to the generations, and then the basic qualities of the generation Y and their differences from other generations are specified to answer to the expectations in the working life. The expectations of the generation Y are determined based on the results of the academic studies, and these are examined according to the results of the national and international studies carried out in order to measure the expectations of the generation Y in the labor market. Studies have been presented in many fields, notably sociology, regarding the differences between generations. However, studies on generations and their characteristics and the impact of these on the working life is relatively new in business administration. Due to being the period where the intensity of technological developments be-

gan, especially in the 2000s, generational differences began to be discussed more (Özer, Eriş and Özmen, 2013). This study intends to determine the differences between job satisfaction mentalities and job satisfactions based on the generation Y employees in business life and to offer a guidance for the strategy proposals to be developed for the management of generations in a unified manner.

As the objective of the study, data were collected, analyzed and evaluated by using the interview method in order to determine the job satisfaction of the generation Y.

2. Conceptual Framework

2.1. The Concept of Generation

Although the concept of generation seems to be new from a historical perspective, it is accepted that it dates back to the Ancient Greek and Egyptian Civilizations. Turkish Language Society explains the generation concept as “The group of individuals forming age clusters of approximately twenty-five, thirty years; cohort”, “Community of people who are born in approximately the same years, share the conditions of the same age, similar issues and destinies, and are responsible for similar duties” (Turkish Language Society, 2019). Another definition of the generation concept is “A group of people who are born at about the same time and have similar living conditions and responsibilities during the period from the beginning of human history to the present” (İzmirlioğlu, 2008: 42).

It is possible to make distinctions based on biology and sociology when defining this concept. While the definitions based on date of birth and time frame are based on *biology*, these have lost their meaning today. As a result of changes such as changing and developing conditions, women’s increased involvement in business life, career perception in people, late marriages and having fewer children as a result, the increased age gap between

children, definitions based on biology have been replaced by definitions based on sociology. *Sociologically based generation* is groups that have similar values, responsibilities, expectations and behaviors and have been affected by common social, political and economic conditions in addition to having birth dates that are close to each other (Özer, Eriş and Timurcan-day Özmen, 2013: 130).

It is accepted that the first theory on the concept of generation is “Theory of Generational Systems” by Ibn-i Haldun, an Islamic thinkers famous for his studies on economy in 14th century (Kuran 2015). This theory states that consecutive 4 different generation types continuously repeat themselves sociologically in a cyclic period every 80 or 100 years. 4 different generations with typical characteristics are: “Artist Generation”, “Prophet Generation”, “Nomad Generation” and “Hero Generation”. Four different generations with different characteristics periodically succeeds each other to form a historical cycle (Acılıoğlu, 2015).

2.2. Classification of the Generations

Researchers represent the classification of generations in different manners. The reason of the differences in these classifications is the idea that the period of time where the people are born is not sufficient. For this reason, economic, political and technological developments and the events, experiences and thoughts of the geography lived in are also effective when making a classification, in addition to the dates of birth (İşçimen, 2012: 2). Especially the last 20-25 years, technological advances is accepted as the most important factor for the formation of generations. Inasmuch as, life styles and behaviors changing with the fast introduction of Internet and mobile communication devices into our lives have an influence on the social structure (Mesutoğlu, 2014).

If we look at the classifications regarding generations so far, we can see that in general 5 generations come to the fore. These are, in order from the oldest to the newest; “Silent generation and Traditions”, “Baby Boomer Generation”, “Generation X”, “Generation Y” and “Generation Z”. Though there are differences of names in difference sources, the same difference exists for the date interval assigned for the generations. For example Generation Y is also called “2000 Generation” and “Millennium Generation”. Some writers even persist on using Millennium Generation instead of Generation Y (Latif and Serbest, 2014: 141).

Researches in Turkey, a classification that takes into the crucial turning points in the political history of the country is preferred. However, there is no systematic study on generations that deal with generations in a sociological, psychological and biological frame. In his study, Aka (2017) classifies the generations in Turkey as follows: Silent generation (1925-1945), Baby Boomer generation (1946-1964), generation X(1965-1979), generation Y (1980-1999), generation Z (2000 and after).

2.2.1. Generation X (1965-1979)

The name of the generation X, following the baby boom generation, comes from being “ex”. And the reason for this is the decrease in birth rates in this period after the rapid population increase in the baby boomer generation. The most prominent reason for this is the women taking more part in the business life, which has changed with the Industrial Revolution. Fukuyama also calls this period as the “great dissolution”. The reason for this naming is the decrease of marriages and child births, increase in divorces, disintegration of families and lack of trust for the enterprises (Sembir, 2004: 24).

Some of the most distinctive features of the generation X members are being hardworking, realistic, contented, caring about quantity rather

than quality, having strong communication skills, being sensitive to social problems and dependent on authority. They prefer individual working rather than in groups, and individualism is at the forefront.

2.2.2. Generation Y (1980-1999)

Also called the Millennium generation by some resources, the Y in the generation Y comes from “Youth”. Comprising the most people in the world today, Generation Y is also called as Millennials, Nexters, www generation, Digital Generation, Generation E, Net Generation. The Y generation members are generally more prone to technology than the generation X, have the ability to multitasking, give importance to relationships and can be successful if managed well, are free spirited, love to live comfortably, and do not hesitate to challenge authority (Atak, 2015: 23).

According to the “Universum2016-University Students and Young Professionals Survey” conducted with 1.5 million young people across the world, the profile of Generation Y youth is classified in seven groups. These are: careerists, entrepreneurs, adapters, hunters, idealists, multinationals and leaders. Careerists have a specific career goal in a business environment; entrepreneurs pursue innovation and creativity; adapters prefer to work regularly in a workplace; hunters pursue high-income jobs; idealists desire to work as per a vision; multinationals want to work in an international business and environment; and leaders are brave people who wish to be in a decision-making position. Hunter, careerist and multinational profiles are more common in Turkey, while adapters and idealistic profiles are less common (Bakırtaş, Devinoğlu and Akkaş, 2016: 15).

2.2.3. Generation Z (2000-...)

Considered as the “mysterious children of the near future”, generation Z is also called as “Zero Generation” or “Net Generation”. The reason is their ability to use the technology very well, and the fact that they were

born in technology (Senbir, 2004: 29). Türk (2013) described the generation Z as the generation born and raised in social media, android phones, social posts and cloud computing environments. On the other hand, he states that they will be individuals who cross the geographical boundaries with one click, who can integrate with other cultures and therefore do not have complexes. This generation is considered to be a generation with higher income prospect compared to other generations, where female employees will have more advantageous jobs and occupations with higher incomes, and where the social roles of men and women will change, an individualistic, independent, creative and innovative generation inclined to live alone, but with a lower sense of loyalty.

2.3. Career Anchor Concept

Career anchor is the sum of abilities, instincts, needs and values that the employees perceive in themselves, which form their professional selves and manage the decisions related with the work (Schein, 1990: 2; Chang et.al., 2012: 310; Lee and Wong, 2004: 11). Developed by Edgar H. Schein and Thomas De Long in the 1970s, the career anchors model initially consisted of 5 dimensions introduced by Schein, and 3 more dimensions were added to the model by De Long later on (Steele and Smythe, 2007). The dimensions belonging to the career anchor model are (Schein, 1990: 5-11; Hardin et.al., 2001: 124):

- **Security/Stability:** Tendency to prefer geographical or financial security to become a part of an organization,
- **Autonomy/Independence:** The desire to work under organizational policies that are not restrictive and few in number,
- **Technical or Functional Competency:** Tendency to avoid general management jobs and to prefer jobs where one can utilize their technical skills,

- **General Management Competency:** Career choice, where one desires to assume responsibility and manage others,
- **Entrepreneur Creativity:** The desire to establish one's own business where possible in order to create something new,
- **Commitment to Service:** Tendency to realize one's values, instead of expertise and capabilities in business life,
- **Pure Defiance:** Tendency to love fierce competition and to solve unsolvable issues in order to overcome obstacles,
- **Lifestyle:** The desire to unify work, family and entertainment functions.

In their first years of work one does not have a career anchor. While early career decisions are mostly erroneous, a person starts to correctly evaluate their capabilities, needs and values by gaining information on career paths in a few years (Feldman and Bolino, 2000: 55). They develop a career anchor within 5-10 years based on the feedback from the experience and this anchor limits the career choices by making the overall personality of the employee a balancing power and guiding the future career choices (Schein, 1990: 2). Schine (1996) pointed out that career anchor includes the perception of one's own abilities and skills, core values and needs and motives within the frame of future career, and that it may change over time, but that it is necessary to be relatively durable and stable for change during such times (Gürbüz and Sıgır, 2012; Kaplan, 2014: 122).

2.4. Career Anchors with regards to Generations

Generation X is comprised of people born between 1965-1979. The members of this generation are negative and individualist. They are fond of change and variety. They are loyal to their families and friends, not to the enterprise they work for. It is easy for them to quit their job, to choose

the better option with regards to their positions, salaries and themselves. Money is not necessarily a motivational factor, but lack of money leads to loss of motivation. They always question the authority figures. They are supportive. They prefer flexible works. Their personal values and objectives related with the work are more important. In general, they have grown up as children with working parents. They continuously learn and develop their skills. They have higher technical skills. They are entrepreneur, creative, practical and optimistic.

Generation Y is comprised of people born between 1980-1999. A child-centered family has replaced the patriarchal parent structure, a technology and consumer society has emerged, where the child decides from the food to be cooked to the program to watch and what to do on the weekend. Conflicts have risen in the working environment with the people from this generation, who took the authority in the workplace as well as at home. If the employers lay off the personnel, this generation does not prefer to be loyal to them. This generation has the sole goal of individual wealth and personal lifestyle (Başal, 2014: 92-118).

Generation Z includes people born in 2000 and later. They do not have the skills to influence the world and work life as they are still under their twenties and did not enter into the business/social life yet. Generation Z will have serious implications for the future and work life with its mystery. They are considered as lifetime learners with multiple diplomas, who do not accept passivity. Their close relation with technology, the fact that they act on what they want without waiting, and the alternatives they possess make them hesitant and unsatisfied (Acılioğlu, 2015: 30-31).

2.5. Human Resources Management

In achieving the goals an organization, correct and effective use of resources is as important as the presence of these resources. Having a key

role in success, the importance of human resources increases each day. Initially named as personnel management (PM), and fulfilling responsibilities such as selection, training, wages and promotion of the personnel required, Human resources is now called as human resources management (HRM) (Şimşek and Öge, 2009: 1).

Considered as the most valuable resource of organizations, the human beings shapes and adds value to other material and monetary resources (capital, raw material, etc.). The main goal of HRM within the organization is to ensure the selection of suitable personnel, training, remuneration and resolution of potential or existing problems in order to use this resource effectively and efficiently. With regards to this function, HRM has an important place for organizations and employees. Considering the human being as a part of the organization, HRM handles them together with their place in the organization and with their relations with other elements. In addition to efficiently and effectively utilizing the human resource of the organization, it also fulfills a task that takes into account the material and non material satisfaction of the individuals. It strives to benefit from the skills, knowledge and experience of human resources so as to provide the highest benefit for the organization (Mucuk, 1997: 190).

In the definitions given for HRM, it is possible to encounter multiple synonymous concepts. For example, “Human Resources Management”, “Personnel Management”, “Labor Management”, “Labor Relations” (Aykaç, 1999: 18). In this study, the most widespread concept today, “Human Resources Management” is used. Tüzüner (2014: 59) defines HRM as “procurement and selection of employees in businesses, their training, evaluation, protection of their health, and regulation of their relations with the employer”. Byars and Rue (1991: 6) have defined HRM as “the unit, which improves the cooperation between employee and employer, contributes the personal development of the employee, executes the functions

such as recruitment, selection, placement, recognition and remuneration”.

If we were to give a general definition of HRM, it can be defined as “the management approach that fulfills procedures such as identifying and meeting human resource needs, selecting, recruiting, and placement of the determined human resource, performance evaluation, training and development in certain periods and as per needs, career planning, motivation, remuneration and personnel affairs, and that focuses on people and adopts the principle of benefiting from the employees at the highest level on the one hand and raising the living standards of the employees on the other hand” (Özgen and Yalçın, 2011: 3).

HRM definitions are in general based on three approaches. These are (Yüksel, 2007: 8):

- Those that consider this as a new name against the personnel management;
- Those that consider it as different from the personnel management, grounds it on a theory, and claims that it could be done through social sciences,
- Market oriented strategic approaches that targets to increase the competitiveness by using human resources more effectively.

The orientation to HRM is based on the insufficiency of personnel management approach and the need to expand its scope. Today, the changes in the management culture exhibit a development from the traditional personnel management approach to the contemporary personnel management (human resources management). That is to say, HRM is in fact a contemporary perspective on personnel management (Canman, 2000: 61). Emergence of the information society with rapid development of information and increase of the interest in and value of human being have played

a major part in the evolution of this perspective. In addition, unlike the traditional management approach, HRM became a contemporary form of personnel management in today's contemporary management approach, as an understanding that cares about facts such as productivity, efficiency, benefit and effectiveness, as well as job satisfaction and employee happiness (Fındıkçı, 2000: 10).

2.6. Strategic Human Resources Concept

With the advances in technology and globalization, the change experienced in social and economic field led to an increase in competition. This situation resulted with a change in management strategies and techniques that the organizations will apply to achieve their goals. In addition, going beyond an element constituting a cost for businesses, the human factor became an element that should be strategically managed. In addition, with the developments experienced, an integration in the field of strategic management with human resources has come to the fore, and a new approach of strategic human resources management has emerged for the coherence of business and human resources strategies (Armstrong, 2008).

The main goal in strategic human resources management is to create a sustainable competitive edge by increasing the organization's performance. Strategic human resources management considers human resources management in the implementation of business strategies as a strategic partner and advocates that the human resources management fulfills an important function in relation with businesses. Based on this information, it is possible to state that the strategic human resources management is an approach applied in order to survive in markets with fierce competition. Therefore, this approach plays a critical role in managing human resources and ensuring enterprise sustainability as a strategic factor in increasing organizational performance of businesses and gaining competitive edge in the market.

In order to define the strategic human resources management approach, first we have to discuss the differences between strategic human resources management and human resources management. In human resources management, business strategies and human resources functions are considered as separate. However, in strategic human resources management the alignment of human resources management practices with business strategies is underlined. In addition, while the focus of human resources management is individual performance, this shifts to organization performance in strategic human resources management.

Strategic human resources management concept is created by assembling together the concept of strategy with human resources management concept. In other words, the concept of strategic human resources management is achieved by incorporating concepts such as competitive edge, strategic compliance, strategic competence and strategic goal in human resources management (Armstrong, 2006: 115). Beyond a set of practices and functions, strategic human resources management is considered to be an approach that is based on strategic concepts. This approach includes strategic decision making and application of these decisions. For businesses, the analyzes made with the existing human resources practices form the basis of strategic studies in terms of developing general or specific human resources strategies (Armstrong, 2008: 33-36).

The main goal in strategic human resources management is to align business strategies with human resource strategies. This alignment need is based on the idea that human resources, which is essentially a strategic resource, should be strategically managed. In this way, the contribution of human resources to achieving business strategies can be maximum. Strategic human resources management is not a concept related with strategic management expressing solely a long process. It underlines the collaboration of human resources specialists and other unit specialists in actualizing

the strategies and the values of the business by achieving its goals (Armstrong, 2008: 33-36). Strategic human resources management expresses a perspective that is conducted around organizational goals such as increasing the performance of businesses, improving organizational culture by ensuring flexibility and innovation.

Strategic human resources management consists of carrying human resources beyond the basic function of the business by aligning the strategies of the business with the strategy and practices of the human resources. This approach underlines that the human resources management is not only a support unit for the businesses, and carries out a critical function in fierce competition.

Strategic human resources management fulfills an important function for ensuring a sustainable competitive edge for businesses. Strategies adopted by businesses, recruitment, performance management, training and development, and recognition are among the subjects that strategic human resources focus on. For this reason, developing human resources strategies integrated with the business strategies helps organizations to increase the competitive edge and enhance the organization's performance. In other words, human resources functions should be aligned with organization's general strategies.

An enterprise can align its organizational culture with today's conditions by adopting a creative and innovative human resources management approach. In order for organizations to compete in global markets, it should be managed by employees who think, make decisions and lead globally. Businesses that are able carry out all these should change the function of human resources management for businesses. All these reveal the importance of strategic human resources management practices for businesses (Barutçugil, 2004: 106-107).

2.7. Human Resources Management and its Interactions with Generations

Transformations and developments in almost every field are also to be found in social structures and even trigger changes in beliefs, lifestyles, attitudes and behaviors. The reflection of this situation in the generations lead to conflicts and incompatibilities in social life as well as in business life. These generational conflicts have become one of the reasons of the issues in human resources management in the organizations today. However, for organizations that understands and attach importance to the generation concept, it is possible to prevent and overcome these issues. Today, employees from at least 3 generations, especially the generation X and Y, the baby boomer generation and even the generation Z work together. The fundamental values, characteristics of these generations and their approach towards the organization vary. As these differences can lead to conflicts and issues in the working place, HRM practices and strategies that comply with the expectations, desires and tendencies of each generation should be designed in the management of generations (Gürbüz, 2015: 40).

2.6. Socio-economic Approaches with regards to Human Resources

2.6.1. Globalization Approach and it Historical Development

Globalization came up as a new definition for the economic system on the eve of the 21st century of the capitalist economic system (KES). Starting in the 80s, this approach has taken its place in the historical development as the most important phase of the capitalist economy and system. Capitalism as a concept, which explains the social structure, is actually an economic structure and a mode of production. Based on the liberal thought, capitalism is characterized by a free market allowing restricted government intervention, free domestic and international trade, competi-

tion, private property and bargaining right. Emerging with the industrial revolution, in the capitalist approach enterprises using production means to make a profit are called capitalists. There are three factors in capitalism. These are the capital, labor and land. Entrepreneurs gather these factors together to make profit. Seen as a mode of production above all, it is possible to list the main features of capitalism as follows (Sancaktar, 2008): Wages to pay for the labor used in production, its impact on the market in production, contributing added-values such as profit and interest, and the capital accumulation being based on production, the formation of competition and monopoly among capital groups, unplanned developments and crises in the economy, the commodities determining human relations and economic alienation as a result of labor being considered as an input.

One of the first thinkers that comes to mind when one talks about capitalism is of course Karl Marx. Marx has discussed the historical process of the capitalist system in the books he wrote, notably in “The German Ideology”, “A Contribution to the Critique of Political Economy” and “Capital”. Karl Marx states that capitalism dates back to 16th century. And it was systematized with the developments in industry until the 18th century. With the increase of globalization and competition in 21st century, it was able to spread more rapidly (Aytaç and İlhan, 2008: 186). The development of capitalist system in history is classified in three main periods: “early, high and late”.

The main characteristics of early capitalism is the developments in agriculture and commerce. It was a period, where the idea of an agricultural capital accumulation began to dominate, as the land or agriculture, produced more than the consumption needs of the producers. In this early period of capitalism, the agricultural products were transported to other regions and exchanged for precious metals or other requirements. Also called as agricultural capitalism, another characteristics of this period is

the presence of private property, free movement, freedom of enterprise and inheritance. It was a period where the production was low and the greed to make profits increased, and the moral understanding in economic relations was not very important compared to other periods.

The state control, which was dominant in the high capitalism period and in the early capitalist period, gradually began to be transferred to private enterprises. Together with the developments such as the emergence of new trade routes with geographical discoveries, the increase in capital accumulation, the access to new and abundant raw materials, and the formation of large markets, the industrialization process in the world has also accelerated. As it can be seen from its name, this is accepted to be the period where the propagation of the capitalist system was the fastest. These rapid developments brought about issues, caused controversies and led to the evolution of the system. The main events that were turning points with an impact on the whole world during the period of high capitalism are as follows; the industrial revolution, the first world war, the great economic depression of 1929 and the second world war. During the industrial revolution period, capital was accumulated in the countries due to the effect of capitalist thought, colonial states were formed, industrialization or mechanization emerged as a result of new inventions, production has increased and costs have decreased thanks to the production in large-scale factories, and a labor class was formed in the society. This has led to trade-unions. Profit maximization desire and colonization movements as a result of the industrial revolution, and the search for new raw materials can be given as the major reasons of the first world war. The human and economic cost of the war was very high. Economical power decreased, and the number of inventions were fewer as a result of the producing and consuming population lost in the war. The aftermath of the first world war, the discovery of new trade routes, the development of capitalism in Europe also contrib-

uted to the period known as the 1929 economic depression in history. The speculative transactions in the stock markets, the failure to meet the increasing liquidity needs, and the bankruptcies spread throughout the world in a short time. These developments caused unemployment and a decrease in production, all countries in the world were affected in a short time span, and it took its place in history as the first and biggest crisis experienced by the capitalist system. The Keynesian Theory in economy emerged as a result of these conditions. Occurring before the world got rid of this crisis, the second world war caused a great destruction, notably in Europe. With the inclusion of Japan and USA in the war, all the world was affected. As in the first world war, the second world war also affected the working class, and due to the decrease in the number of employees and the price instability, inflation reached very high levels in many countries. Countries that were obliged to contain the damages caused by the structures that emerged in the form of stockpiling and monopolization had to intervene more in the economy.

The destruction, tragedy and deep economic issues caused by the events that took place in the period of high capitalism and that were important for world history led to great transformations in the period considered as the late capitalism period. With national development coming to the fore especially after the second world war led to the spread of socialism, which was seen as a reaction to the capitalist system, and planned and new economic policies emerged. The states started to intervene when necessary in order to achieve the predefined goals in situations where they see economy as problematic.

The main transformative forces in the world in the last century were the state, science and technical knowledge. Capitalism has been the main transformative force for societies and even the world, with the lack of vision and project development experienced in recent years, and the

technological power accumulation of some large companies as a result of globalization. However, it would not be correct to see capitalism solely as a mode of production or an economical system. It is a fact and process in the historical process that is formative, constructive-creative, disruptive-destructive in the focus of new markets and new needs (Beaud, 2016: 414). Main ingredients forming the capitalist system are in place. These components, which are considered as the main institutions of the capitalist system, are not totally separate from each other. They are codependent (Hazlitt, 2002). The main ones are: **Private property** is the recognition of and respect for the property rights of the producer. Production and entrepreneurship cannot be expected to develop where private property is not ensured. **Free markets** are the creation of a free environment for transferring

In the structured interviews, the interviewee is asked to answer predefined questions using the predetermined standard answers. In unstructured interviews, there are open-ended non-standard questions (Tekin, 2006: 101). Data in this research is collected through unstructured interview technique. The research was carried out through unstructured interview technique, consisting of open-ended questions predetermined in accordance with the objective. In the literature survey phase, local and international studies were used.

3.3. Population and Sample

The population consists of the generation Y employees working in Istanbul. The sample consists of 20 people working in various industrial fields. Purposeful sampling method was used in determining the sample. In purposeful sampling method, the researcher selects the individuals or objects in their immediate surroundings that will give the most appropriate answers for the purpose of the research until a certain number of samples is achieved (Aziz, 2008: 55).

3.4. Means of Data Collection

In the study, semi-structured interview form is used as a means of data collection. The interview questions were prepared by the researcher using the relevant literature to measure the research question. In this context, 10 questions were applied to the determined sample. In the preparation phase of the semi-structured interview form, general questions for the views of the participants and focused questions regarding their tasks in the businesses they work. The interviews are conducted within the frame of the voluntary basis and scientific ethical rules. Face to face interviews lasted approximately 30 minutes. Additional questions were asked during the interview. The voice of the interviewee was recorded upon permission. Detailed notes were taken in the case where the interviewees who did not wish to be recorded. These recordings then were transcribed.

3.5. Analysis of the Data

Data collected as a result of the interviews are categorized and descriptive analysis method is used for analyzing the data. In the descriptive analysis process, the views of the interviewees are coded by separately evaluating these and then the themes are created. In qualitative research methods, the data collected based on the answers that are similar are gathered together and organized as themes (Yıldırım and Şimşek, 2008). These themes are evaluated in the light of the data collected and literature research. In qualitative research methods, the researcher gives a meaningful structure to the information gathered by revealing the themes (Yıldırım, 1999). In addition, in order to set forth the striking points in the views of the interviewees, direct quotes were used.

3.6. Interview Questions and Research Questions

In the study, the expectations and desires of the generation Y employees and their views on the factors affecting job and career satisfaction

are examined. Along with the questions asked to the participants, the research aims to examine the views of the generation Y employees about the factors that ensure job satisfaction and motivation. Answers given to the questions that were prepared in line with this main goal are evaluated.

3.7. GENERAL EVALUATION OF THE FINDINGS

The results of the research conducted in order to determine the job satisfaction of the generation Y employees and what will satisfy them in their jobs are as follows:

Though not all of the participants shared their socio-demographic information, when we look at those who provided information on the subject matter among 20 participants, it is seen that their age distribution is between 25-37, they work in the private sector and 3 people worked in managerial positions. Based on the information shared, where available, about the working period, this period is between 1.5 and 12 years. When the findings were evaluated, the most frequently repeated subjects in their views regarding the factors that provide job satisfaction are; work environment and colleagues (5 people), doing the job correctly and with quality (4 people), career and training opportunities (4 people), the structure of the job (3 people), being recognized (3 people), wage (2 people) and competence (1 person).

While the participants did not approve of the rudeness in the relations between colleagues, they expressed that the presence of good and quality communication would increase their job satisfaction and motivation. They have stated that factors such as a comfortable working environment, the availability of recreational areas in the office for long working hours, a pet-friendly working place for ease of mind, the possibility for activities with their colleagues in the office, and flexibility of working hours the next day after a busy working day, etc. will increase their job

satisfaction and motivation. Use of current technologies suitable for the work done in the design of the work place was another subject that was mentioned. In addition, peace-of-mind at the work place was mentioned as important. Interviewees also stated that being recognized for their efforts and for the work they do would increase their job satisfaction.

The most frequent theme in the views of the participants regarding the factors that ensure career satisfaction are; career opportunities (6 people), doing the job correctly and with quality (3 people), wage (3 people), the structure of the job (2 people), being recognized (2 people), meeting material and nonmaterial expectations (1 person), personal development (1 person) and personal competence (1 person).

Another important issue in terms of job satisfaction was the promotion opportunities in parallel with their success in the workplace and working time. Interviewees stated that when they do their jobs correctly and with quality, this will bring about success and lead them to success in their professional lives. In addition, they stated that the belief that they can go further than the position they started with in their professional life improves their career expectations, and this situation contributes to them with its material and nonmaterial dimensions.

The most frequent themes in the stated views of the participants regarding the factors that negatively affect their job satisfaction are; Communication with colleagues and management (4 people), low pay (4 people), not being recognized (4 people), not being entrusted with responsibility (4 people), lack of career opportunities (2 people), uncomfortable working environment (1 person), lack of innovation and not being open to innovation (1 person). Interviewees stated that communication is extremely important in the working environment and that communication should be established in an effective and healthy way not only with colleagues but also with management level. The interviewees expressed that this contrib-

utes positively to the businesses. The most frequent themes in the views of the participants regarding the factors that ensure work motivation are; career and training opportunities (5 people), success (5 people), being recognized (4 people), wage (2 people), working environment (1 person), being ignored (1 person). Interviewees expressed that their job satisfaction and motivation would increase when they believe that they have the necessary competencies related to the work they do, when they are successful, when the success is spread throughout the organization, and when they are a part of successful projects. In addition, one interviewee stated that they wanted to achieve success by establishing a business from scratch, and emphasized the importance of this. Finally, the most frequent themes in the views of the participants regarding the factors that adversely affect the work motivation are; low wage (8 people), not being successful (6 people), lack of career opportunities (3 people), not being recognized (1 person), being ignored (1 person), unfavorable working conditions (1 person).

Interviewees stated that while a sufficient wage would increase their motivation, a wage that does not amount to their efforts and does not meet their needs and expectations will negatively affect their job satisfaction and motivation. However, 1 person underlined that they do not attach too much importance to the wage.

5. Discussions

Differences between generations and their effects on business life and business relations are one of the most riveting issues of the recent period. Denoting groups of people who were born about the same time, generations also represent groups of people who have similar living conditions, working conditions and expectations. Generally referred to as the generation Y, this generation includes people born between 1980 and 2000, and has different characteristics from the previous generations in terms of the conditions and the developments of the period they grew up

in. All these differences have an impact on their business values, their expectations from a work and the factors that provide satisfaction. Based on this, the problematic of the study was to determine the factors affecting job satisfaction based on the expectations of the generation Y.

This study intends to determine the thoughts of the employees belonging to the generation Y on job satisfaction, and what satisfies them in the work they do. For this purpose, 20 people working in various business fields in the industry sector were selected by convenience sampling method in Istanbul. In-depth interview technique was applied to collect data from the selected people, and the data obtained were evaluated using the discourse analysis method. Unstructured interview technique was preferred for the in-depth interview technique used, and for this purpose, 2 open-ended questions were asked to the interviewees. All the sample group provided feedback.

When the data obtained from this practice is evaluated, the opinions of the generation Y employees on the organization they work for and the work they do, the factors that satisfy them in their work, and their expectations and desires have been determined.

As for the differences of generations in the work life, the literature focuses on the distinguishing characteristics of generations, their attitudes and behaviors towards work, aligning these differences and producing solutions to prevent possible negative consequences.

In a study examining the reasons of nurses for leaving employment based on generations, Le Vasseur et al. (2009) found that the dissatisfaction with the wages was the highest rated reason in generation X and generation Y.

In a study examining the factors affecting job satisfaction and leave of employment intention of healthcare professionals from different gen-

erations, Bezirci (2012) showed that the generation Y group had a higher intention to leave their job and lower job satisfaction compared to the other generations. While the generation X had lower job satisfaction compared to other generations, factors such as physical conditions, individual factors, interpersonal relationships and control/autonomy were lower in generation Y compared to other generations.

Özer et al. (2013) investigated three generations (baby boom, X and Y) in their study regarding the differing work values of generations. Generation Y is divided into two groups as those born in the 1980s and those born in the 1990s. The findings obtained show that the generation Y values vanity more than other generations, and they are behind the previous generations in terms of honesty and nationalism and are less strict than them. The members of the group born in the 1990s have a lower sense of responsibility, discipline, are less hard-working and frugal, and are more factionist, skeptic, materialist, self-interested and risk-taking. The findings show that they give less importance to justice compared to other groups, and they attach more importance to rank and office.

When compared with the findings obtained in our study, factors such as wages, promotions, and the expectation of being recognized are also important values in our generation Y sample group, and at the same time, the job satisfaction of the generation Y also takes place near the top.

As can be seen in the literature survey above, these results show that the socio-economic processes crystallize the significance of Strategic Human Resources Management which rose to prominence with globalization. In this context, we can state that this study illustrates the impact of the Generation Y on the Human Resources Management processes in businesses, and that a new generation with a new HR understanding reveals the importance of HRM in terms of strategic management.

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IMPACT OF THE ROLE OF LABOR UNIONS ON WORKER - EMPLOYER RELATIONS ON THE ACHIEVEMENTS AT UNION LOYALTY OF UNION MANAGERS: A RESEARCH IN THE METAL INDUSTRY

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** Aydın BAYSAL

Abstract

Labor union managers have an important role in the establishment and organization process, activities and the future of labor unions. Familiarity and knowledge of labor union managers on social, economic and legal issues have an impact on the fact that union management has become a profession.

Union managers should have a profound vision on union activities, worker-employer relations, protecting the rights of workers, creating a union culture, changing the way their members think and behave, and increasing their loyalty and participation. In this research, the impact of the role of union managers working in the metal industry in ensuring worker-employer relations, achievements and union loyalty of has been studied.

The role of unions on worker-employer relations has influenced the achievements of union managers, union loyalty, faith in the importance of

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unionism, their willingness to work for the union and their responsiveness and loyalty to the union.

Keywords: Worker-employee relations, loyalty to the union, achievements.

UNIONS AND EMPLOYER RELATIONS MANAGER AT TURKEY'S ROLE OF THE TRADE UNION AND THE TRADE UNION COMMITMENT TO BUSINESS SUCCESS EFFECT: A STUDY IN THE SECTOR METAL

Abstract

Trade union executives have an important role in the establishment and organization process, activities and future of the unions. It plays a role in union management becoming a profession by being aware of socio-economic and legal issues and having certain characteristics.

Union managers should have a vision in union actions, worker-employer relations, protecting rights, creating union culture, changing the way their members think and behave, and increasing their loyalty and participation. In this study, the effect of the role of union managers working in the metal business sector in ensuring employee-employer relations, on the business success and union loyalty of the union managers was investigated.

The role of unions on worker-employer relations has influenced union managers' job success, union loyalty, belief in the importance of unionism, their willingness to work for the union and their responsiveness and loyalty to the union.

Keywords: Employee and employer relations, union loyalty, job success.

1. Introduction

The impact and effectivity of labor unions and the attitude of workers to-

wards them are shaped by the social, economic and historical characteristics of a country. The process of establishment, development and organization of labor unions in Turkey has been somewhat different as compared to Western countries. It is therefore important to reveal the issues regarding trust and collaboration and review the country's subjective conditions regarding globalization as well as specific characteristics of labor unions.

The unionization process in Turkey is central and hierarchical. There is also a trend of participation to a certain extent. The organization committees of labor unions and ineffective and non-functional as compared to the decision makers. The regulations on labor unions assign responsibilities like making collective agreements, going on strike or using the financial resources to management bodies, which encourages a centralized organizational structure. This centralized structure along with the managers' will to maintain their positions and their dominance create problems in terms of maintaining a democratic atmosphere within the labor union. However, it is difficult to find clear evidence as to how this would the number of members of the union. It is difficult for a member to resign from a union considered not to be sufficiently democratic due to cultural and social influences as well as the democratic traditions of the country. However, it is a frequent practice for workers who are not satisfied with the benefits gained through collective agreements or wage increases approved by the unions to resign and join another union in the same line of business due to lack of sufficient mechanisms and organization to receive their complaints. Taking this path rather than trying to solve the problems within the union results with the diminishing of transformative dynamics and union leaders expanding their sphere of influence and increasing their power.

Problems arising from the lack of democratic processes within the union prevent an increased sense of ownership and loyalty among union members and decreases trust to the unions. The lack of member support

which is a necessity for the union to efficiently implement its unique policies is a result of such distrust. Many years of delegation of powers to the union leaders and failure to participate in the decision making processes within the union result with a lower possibility to owning problems and alienation with the union.

Labor unions are required to solve problems, meet requirements and detect aspirations and prioritize on these to earn the support of the workers. This requires unions to adopt a wider interpretation on the functions of labor unions and aspire for a wider collaboration among the working class.

2. Conceptual Framework

2.1. Labor Unions & Unionism

Labor unions are among the building blocks of industrialized and developed economies. Labor unions are major organizations which regulate working life and prepare the society. Labor unions exist in most of the world. This is where union activities begin. As a result of the increasing pace of industrialization and the expanded manufacturing output, increased working hours and worse working conditions as well as decreased wages and increased poverty among workers resulted with the workers taking action. This resulted with workers getting organized in labor unions.

The word “sendika” (labor union) is a historical phrase used in Greek and Roman legal terminology. The phrase “syndic” refers to an individual responsible for representing a certain professional group and protect its benefits. “Syndicat” was initially used to describe the functions of “syndic” and later refers to performing those functions (Uğurlu & Arslan, 2019: 80 from Işık, 1962). In Turkey, a labor union is defined as “a legal entity established to protect and develop shared economic and social rights and benefits of workers and employees in business life”. (Turkish Linguis-

tic Society, Contemporary Turkish Dictionary, 2019).

Article 2 of the Labor Unions Law 2821 defines a labor union as “a legal entity established by workers and employees to protect and develop shared economic and social rights and benefits in business life” and a confederation as “a legal entity which brings together minimum five labor unions from different lines of business”. These definitions form the legal basis of labor union organizations in Turkey (Uğurlu & Arslan, 2019: 80).

Democracy is also defined as “the regime of institutions”. Labor rights and unions are foundational to general freedom in such organizations. Specifically “labor unions” promote harmony and stability in political, economic and social structures. Labor unions are represented at the relevant ministries. In Western countries, they are represented in political initiatives to impact the legislative process under the principle of participation in management (Odaman, 2004: 16). Labor unions in Western countries are capable of such initiatives because of the high level of participation and a sense of conscious organization. Paid laborers (workers and civil servants) can therefore have a say on social, political and economic issues through labor unions. The principles of social state and democracy help labor unions advocate for a fair distribution of the national income and social state (Demir, 2013: 20 from Çelik, 1999: 340).

Democratic social structures are organizational structures. Labor unions are among them. The improvement of labor unions in Turkey requires more “representation and membership” in labor unions and the improvement of “strike” and “collective agreement” rights. This will help “social justice” through a fair distribution of the national income as well as improvement of freedom and social rights through manufacturing efficiency. Collective Agreements Law 6356 defines labor unions and similar organizations as free and independent legal organizations established by individuals with common goals for public benefit. The principles of labor

unions are as follows (Hüner, 2004: 5): They are free and independent legal organizations established by individuals with common goals. Establishment of a labor union or a confederation does not require a permit. This is what makes them independent. Independence of labor unions is made possible by the avoidance of the government to offer them any help or make any negative intervention in their establishment and the fact that the organization is a result of the free will of individuals who establish them. Confederations and labor unions become legal entities upon submittal of the necessary documents to the legal authorities by the founders (Sümer, 2000: 130).

Article 51 of the Constitution and the Labor Unions Law state that labor unions are established by employers and workers solely for the purpose of protecting their social and economic rights and benefits in business life. This is what the purpose of their establishment should be. On the other hand, Article 58 of the Constitution states that workers and employers are entitled to collective labor agreements to specify their social and economic standing (Akça, 2007: 25).

Labor Unions Law Article 40 states that employer and labor unions are independent from the government. The article states: "Labor unions shall not receive donations from general or mixed budget institutions, local governments and their fixed or circulating capital organizations, business enterprises and organizations with its capital fully paid by the government, banks which are fully or partially owned by the government, insurance companies, insurance companies, public institutions, professional organizations, banks and institutions established by special laws, organizations minimum half of which are owned by governmental bodies or banks listed in Article 41 of the Labor Unions Law, or political parties." (Labor Unions Law 6356. Articles 40-41).

Labor unions are private law legal entities. Public services assigned

to labor unions do not prevent their status as a private law legal entity. Labor unions are continuous legal entities with a name with the purpose of achieving their objectives, use the rights of strike and lock-out, make collective labor agreements, and engage in activities listed in Labor Unions Law Article 33. This separates labor unions from active worker groups which tend to end once it is realized that the objective is not achievable. On the other hand, in addition to Labor Unions Law Article 2 defining labor unions as legal entities, Article 6 of the same law clearly states that confederations and labor unions will achieve the status of a legal entity upon application to the relevant governorate (Tuğ, 1992: 6).

The duties and responsibilities of confederations and labor unions are stated more clearly and coherently in Labor Unions Law 2821 as compared to Labor Unions Law 274. The law lists the “legal activities” that can be performed freely by labor unions (Articles 32 and 33) as well as “banned activities” (Article 37, 38 and 59). We should therefore review the “legal activities” and “banned activities” (Demir, 1999: 211).

Social activities at labor unions are important to achieve the objectives of the unions, boost loyalty of the members and support a spirit of collaboration (Ersinadım, 2000: 238). Legal activities of labor unions are those “compliant with the applicable regulations”. These activities are constitutional and listed in Labor Unions Law 274 as legal and are listed in two groups in Labor Unions Law 2821 as activities of “labor unions” and “confederations”. The first section of the Law lists “Activities of Labor Unions in Business Life”; and the second section lists “Social Activities of Confederations and Labor Unions” (Demir, 1999: 211).

Article 32 of the Labor Unions Law lists the developments regarding the activities of the labor unions. Activities of Labor Unions in Business Life (Altan, 2003: 187): Deciding and managing strike and lock-out, making applications to the arbitration committees, authorities, courts and

arbitrators in collective labor disputes, representing the members in courts for contracts, transportation and service agreements and other lawsuits as a result of collective labor agreements upon written application by employees or employers, signing collective labor agreements

2.2. Role of Labor Unions on Worker-Employee Relations

Social incidents originate from the relations between individuals. The foundation of these relations are the initiatives resulting from trade problems between individuals. These relations have an impact on social and political relations. Unionism starts at an individual level and exists as a financial and ideological integration of individuals for their benefits at social and political initiatives (Baydur, 1974: 92).

Workers have a disadvantageous position in their relations with the employers. Labor law originates from the need to protect the rights of the employees under severe working conditions resulting from industrialization. The workers are at the focus of the relations between the government, workers, employees and organizations. A worker is under the liability of working starting with the signature of the employment agreement and this results with a personal dependency. Focus points of Turkish labor law includes protection of the worker and the personality of the worker. A historical perspective to the relations between workers and employers reveal that they are not in a state of equality. During the era of mass manufacturing which started with industrialization, employers came to own the capital and the means of production and have always been in an advantageous position against the workers (Orhan and Uysal, 2019: 2 from Işıklı, 2013: 4). The foundations of this advantage are the social differences and the accumulation of capital in the hands of land owners, especially after the industrial revolution in Europe. Following the industrial revolution, workers dependent on the mass manufacturing system created by the owners of the means of production emerged as the working class.

Unionism is a major force in the business life in industrialized economies. Labor unions promote the regulation of business life and engage in initiatives in an effort to shape the society in the long term. They need to develop the organizational structures and ensure communication between the stakeholders of business life to perform these functions. In brief, labor unions should be in contact with the employers and the workers and ensure social communication between the parties. Union representatives at workplaces have a major role in ensuring social communication. Union representatives ensure communication between the member and the union, the employer and the union, and the employer and the member (URL-2, 2019).

Union representatives are initial representatives of the union and the member. Union representatives should be in close contact with all members to maintain achievements in their activities. This helps build trust between the union and its members. Close contact with members help them inform the union representatives on problems easily. Union representatives function as a direct and single point of contact for the members. Members get to learn about and familiarize themselves with the union through union representatives. Representatives represent the union before the members and special care should be taken regarding the relations with them.

Union representatives should avoid developing relations with the members on a personal level because this may prevent major opportunities which may otherwise achieved. Union representatives should be fair to all members regardless of belief, ideology and ethnicity. They should never discriminate. Discrimination will harm comradeship and integrity at the workplace. Union representatives should not discriminate and handle all issues immediately and with the same care. They should listen to the members, take the necessary action and make efforts to solve the problems.

Certain problems may not be solved regardless of the efforts and initiatives. The reasons should be transparently communicated to the members in an effort to build trust. Major responsibilities of union representatives include helping new recruits learn about the union and the workplace, recruiting them for union membership, reinforcing their relations with the union, informing them about union and legal rights and encouraging them to join union activities.

Union representatives should keep the members up-to-date about union issues, encourage them to actively engage in the decision-making processes as well as union activities without discrimination. Union representatives should inform the workers on all aspects of union policies, decisions, programs and approaches regardless of their willingness to participate. Transforming the awareness of members on their problems into a social awareness on a larger scale is a major function of union representatives. Achievement in this function requires that the union representative closely follows the national and global agenda. Representatives who avoid this may not have any idea on how to work on such awareness.

Union representatives should also be in touch with non-members and try to convince them to join. More union members at a workplace will mean a stronger organizational structure at the workplace. Union representatives should be in touch with them and convince them for membership. Members from all roles and positions will result with a stronger union. Even in case of failure to convince them to join, union representatives should continue to be in close contact with them. Calls to any initiative or action should address all workers and not just the members, with clear explanations on why participating in the initiative matters. Union representatives should also ensure that union publications are available to all members. The publications should be made accessible by all workers and not just the members.

Union representatives also ensure the communication between the employer and the workers. Union representatives are paid laborers just like union members. Being a union representative may seem to be restricting but this is actually not the case. Certain regulations intend to decrease the radius of action of union representatives in favor of employers. However, representatives are bound to find ways to make improvements in this area within their tasks and responsibilities. Benefits of the workers and the union should be addressed to prevent any doubt regarding the representative's capacity to represent the union. A coherent attitude regarding the relations with the employer will build trust among union members and prevent any possible issues regarding persuasiveness. The foundation of the relations between union representatives and employers is the legislation.

Collective labor agreements usually have clauses which regulate these relations. Union representatives should be informed on these regulations and take the necessary measures to prevent employers from acting in breach of them. The initial path to resolve any dispute with employers is to assess the collective labor agreements and the applicable regulations. Union representatives should then take the opinions of the members and negotiate on how to proceed with the relevant branch of the union. If it is required to contact with the headquarters for resolution of a dispute, this communication should be maintained through the branch. Agreements made with the employers during the resolution process should be followed up.

Lack of organization can even result with the failure to implement laws. Union members should be in a strong organization to make use of the benefits achieved through collective labor agreements and the applicable regulations. This will help union representatives feel stronger against the employers and persuade employers to make decisions in favor of the employees in resolution of a dispute (URL-3, 2019).

2.3. Achievements of Labor Union Managers

Business performance is evaluated by comparison. Business performance evaluation is an audit and method tool to objectively evaluate the performance of the worker and support the individual and the organization for improvement. The insights from the evaluation helps managers schedule activities and take preventive measures on defined issues (Gültekin, 2009: 51). Business performance evaluation also should possess certain qualities to provide expected benefits and efficient results (Can, Akgün and Kavuncubaşı, 2001: 57). These qualities are as follows: Performance evaluation should result with improvements and suitable for a variety of conditions. Performance evaluation should allow participation of the worker, be incentive and continuous, extensive, valid and reliable.

Performance evaluation provides historical data on the worker's performance (achievements - shortcomings). Performance evaluations also provide data for HR departments regarding recruitment, promotion, cease of employment or reward-penalty systems. The success rate of the performance evaluation system used within the organization should also be monitored. The improvement and progress of the organization will depend of the performance evaluation system. A sound knowledge on the level of achievement of the top management and the employers and a review of sources of failure will guide the future strategies of the organization. Therefore, a successful implementation of the performance evaluation system is very important for any organization (Yüksel, 2000: 161).

Competence, styles, efficiency and shortcomings of all employees within an organization should be carefully reviewed regardless of their job definitions (Ghalayini, 2003: 225). Performance evaluation is important for the organization to define any personal impact in achieving organizational objectives (Ludeman, 2000: 46).

Evaluations help organizations as well as individuals to improve (Bayram, 2006: 48). Successful implementation of a performance evaluation system depends for the most part on proper selection of evaluators and the conditions of evaluation. A positive approach by the workers towards the evaluation is also important (Karayel, 2016: 61). Another importance is issue regarding the evaluation of business performance is that the evaluation is accurate, fair and unbiased. Evaluation results should be transparently shared with the evaluated workers and the top management. Achievements and shortcomings are shared with the workers via feedbacks. Opinions which insist on the confidentiality of the performance evaluation base this on the need to prevent any problems between the managers and their teams and any negative opinions about the management. Despite the two different opinions on this issue, sharing of information with the workers and the top management will help the organization achieve its objectives and boost morale (Yelboğa, 2006:196).

There are certain methods and approaches to scheduling and implementing performance evaluation. Another important issue is to select a performance evaluation system compliant with the organizational culture. The performance evaluation process starts with the selection of the items of evaluation and continues with the implementation of the process. An important issue at this point is the consistence of the benefits of the organization and the workers. Feedbacks to the top management and the workers will facilitate the actions required to harmonize the benefits of the workers and the organization (Yıldız, et al, 2008: 239).

Performance evaluation is a six-stage process. The first stage is defining the performance criteria followed by notification of performance expectations to the employees by the organization, measuring of the performance of the workers by the managers, comparison of the performance of workers with standard conditions, sharing the insights with the employees

and taking the necessary measures to improve performance. Methods used by organizations differ by organizational needs and culture. Each method has its own advantages and disadvantages. The method to use should be selected based on what such method measures. Another important issue regarding performance evaluation is that the process should be accurate, unbiased and objective and focus on “achievements”. Evaluation results should be clearly communicated to the worker. Accordingly, the employee will make use of the feedbacks and see their achievements and shortcomings. Some claim that the evaluations should be kept confidential to prevent any negative impact on the hierarchical structure but transparency will boost morale and help individuals commit to the objectives of the organization.

The performance evaluation system are implemented within a specific organization and under certain conditions and therefore it should be updated based on changing conditions to maintain its efficiency. The performance evaluation system should be effectively audited to prevent the system from deteriorating and any incorrect implementation. Continuous monitoring and update of the system is a major requirement of the performance evaluation system (Gültekin, 2009: 134).

2.4. Extent of Union Loyalty

Factors of union loyalty are grouped in four items; namely loyalty to the union, faith in the importance of unionism, responsiveness to the union and willingness to work for the union.

- **Loyalty to the Union:** Loyalty to the union refers to the individual's pride for being a member of the labor union and awareness on the benefits of being a member (Demirbilek & Çakır, 2004; Gordon, et al 1980). Barling et al (1992) writes that there are three elements of union loyalty. The first one is the proudness for being a member of the union. The

second one is the capacity to protect benefits thanks to the union. This element refers to the functions of the union and the perception that the member's requirements will be met. The final one is the willingness to maintain union membership. This reflects the loyalty of continuity from a perspective of union loyalty (Hacıoğlu, 2014).

- **Responsiveness to the Loyalty:** Responsiveness to the union is among the behavioral factors of union loyalty and refers to the willingness of the union member to perform assigned tasks regarding the functioning of the union (Gordon et al, 1980; Snape, Redman & Chan, 2000). Members who feel responsible against the union are expected to be engaged in three types of behaviors: Informing the union about organizational problems, following up whether or not the employer complies with the terms of the collective labor agreement and defending the benefits of the union (Klandermas, 1989). In this sense, a responsive member is a member who informs the union about the problems at the workplace, follows up the terms of the collective labor agreement and defends the benefits of the union (Millioğulları Kaya, 2017: 2071).
- **Faith in the Importance of Unionism:** Faith in the importance of unionism is among the behavioral factors of union loyalty and refers to the general attitude and ideological approach of a member to union organization. Faith in the importance of unionism is about awareness on the functions and tools of a union and attaching value to them rather than an individual labor union (Bilgin, 2007; Gordon et al., 1980). The literature shows that the approach and model developed by Gordon et al (1980) are widely accepted in measuring and evaluating union loyalty. The reasons include the facts that the approach developed by Gordon et al integrates the attitudinal and behavioral aspects of union loyalty, it is strong in terms of in abstract and empirically, and the scale used in the model is sufficiently valid and reliable (Barling, et al, 1992; Bilgin,

2007; Hacıoğlu, 2014; Hoell, 2004; Millioğulları Kaya, 2017; Ladd, et al, 1982; Thacher, et al, 1991). A literature review also resulted with the decision to use the union loyalty model developed by Gordon et al.

- **Willingness to Work for the Union:** Willingness to work for the union is among the behavioral factors of union loyalty and refers to the member's willingness to voluntarily work for the benefit of the union (Gordon et al, 1980; Hacıoğlu, 2014). A member willing to work for the union is strongly committed to the goals and values of the union and is engaged in the activities of the union to an extent exceeding expectations. Behavioral trends of a member highly committed to the union include informing the members on collective labor agreements, following the publications of the union, engaging in labor and social activities, helping recruit new members, informing new members on the activities of the union and engaging in voluntary activities (Demirbilek & Çakır, 2004; Millioğulları Kaya, 2017).

2.5. Factors Affecting Union Loyalty

Presenting the factors affecting union loyalty is important in terms of supporting and increasing loyalty. A number of researches on factors affecting union loyalty focus on qualifications specific to the participant or the workplace. However, Gordon et al (1980) claim that demographics is not enough to explain these factors of loyalty. Similarly, Klandermas (1986) and Snape, Redman & Chan (2000) claim that personal relations between the union and the members are not enough to explain union loyalty. Other factors include social, macroeconomic and political dynamics are also very effective. Barling et al (1992: 75) developed a model on factors affecting union loyalty and their outcomes. Factors of union loyalty are reviewed in seven groups; namely demographics/personal qualities, professional experience, approach to labor unions, personality/attitude towards working, role experience, structural elements and environmental elements.



Figure 1. Factors Affecting Union Loyalty and Results

The results of union loyalty include supporting political action, engaging in union activities, tendency to go on strike, developing a culture of perceived industrial relations, supporting political candidates and recruitment of members.

3. Material and Method

This research is about the role of labor unions on worker-employer relations as well as the impact of this on business achievements and loyalty to the union. The hypotheses of the research are as follows: H_1 : The role of labor unions on the relations between workers and employers have an impact on the achievements of managers. H_2 : The role of labor unions on the relations between workers and employers have an impact on loyalty of managers to the union. H_{2a} : The role of labor unions on the relations between workers and employers have an impact on loyalty to the labor

union. H_{2b} : The role of labor unions on the relations between workers and employers have an impact on the responsibilities of managers against the labor union. H_{2c} : The role of labor unions on the relations between workers and employers have an impact on the managers' faith in unionism. H_{2d} : The role of labor unions on the relations between workers and employers have an impact on the willingness of managers to work for the labor union.

The research group includes members of Özçelik Union operating in the metal business line. The sample consists of 473 members of this labor union. The purpose of the research is to investigate the role of labor unions on worker-employee relations and determine whether or not this has any impact on the achievements of labor union managers and their loyalty to the union. This is an applied research on the opinions of union members on their relations with the union and the impact of these on achievements and union loyalty of union managers. It is a descriptively-designed quantitative research. The data collection method used in the research is surveying. Previous theses and scientific research were used for theorems regarding the role of labor unions on worker-employer relations and its impact on achievements and union loyalty of union members. Surveys on "Personal Data", "Scale on the Role of Labor Unions on Worker-Employee Relations", "Scale on Achievements of Labor Union Managers" and "Scale on Union Loyalty of Labor Union Managers" were used to collect data for the research. The survey is a systematic data collection method with questions and responses.

The survey has four sections. The first section of the survey includes personal details on union members. The scale included in section two is taken from a thesis titled "The Connection Between Labor Unions and Motivation: A Research On Education Sector" by Akbulut (2013). The scale has 22 items and it is a 5-option Likert scale from 1=Totally Disagree to 5=Totally Agree. The scale titled "Scale for Achievements of La-

bor Union Managers” in section three is taken from a thesis titled “Impact of Interactionist and Transformational Leadership on Intentions to Cease Employment and Business Performance” by Keleş (2017). The scale has 4 items and it is a 5-option Likert scale from 1=Totally Disagree to 5=Totally Agree. The scale titled “Scale for Union Loyalty of Union Managers” in the final section is taken from a thesis titled “Approaches of Union Members Towards Unions and Union Loyalty by Confederation” by Millioğlu Kaya (2015) and the items of the scale were adjusted to reflect the opinions of union members on union managers. The scale has 28 items and it is a 5-option Likert scale from 1=Totally Disagree to 5=Totally Agree.

3.1. Factor & Reliability Analysis of the Scale “Role of Labor Unions on Worker-Employee Relations”

Internal consistency and reliability of the scale “Role of Labor Unions on Worker-Employee Relations” is evaluated here. Evaluations based on the results include which factor each statement is covered by, the number of factors generating the scale and the level of reliability of the Cronbach alpha factors in general and in relation with the factor. KMO (Kaiser-Meyer-Olkin) test to measure the internal consistency and reliability of the scale “the role of labor unions on worker-employer relations” is 96.9%. $96.9\% > 0,50$ and therefore the data set is suitable for factor analysis. The second test performed is the Bartlett test. The test is meaningful based on the outcome of the analysis ($p=0.000 < 0.01$). This result confirms that the data set is meaningful and suitable for factor analysis. The general Cronbach alpha factor is detected to be 0.980 based on the reliability analysis. This result confirms that the scale has a high level of reliability. Analyses with a factor load lower than 0.50 and listed under a single factor are not included in the analysis. The factor analysis for this scale was repeated with statements 9 and 20 excluded based on this rule. The factor analysis without these statements highlighted two factors. The factor loads

for the first factor range from 0.859 to 0.616 and the variance percentage is 44.316. Cronbach alpha factor of 0.977 confirms a high level of reliability for this sub element. The factor loads for the second factor range from 0.873 to 0.641 and the variance percentage is 32.921. Cronbach alpha factor of 0.921 confirms a high level of reliability for this sub element. All factors account for 77.3% (77.315) of the total variance. The analysis was performed based on the average of statements regarding the role of labor unions on worker-employee relations.

3.2. Factor & Reliability Analysis of the Scale “Achievements of Labor Union Managers”

Factor loads and Cronbach alpha factors of the statements regarding the scale “achievements of union managers” are evaluated here. KMO test regarding the internal consistency and factor analysis of the scale “achievements of union managers” is 86.9%. $86.9\% > 0.50$ and therefore the data set is suitable for factor analysis. The second test performed is the Bartlett test. The test is verified to be meaningful ($p=0.000 < 0.01$). This result shows high correlation between various aspects. The data set is suitable for factor analysis. The general Cronbach alpha factor is detected to be 0.961 based on the reliability analysis. This result confirms that the scale has a high level of reliability. The factor analysis shows that a single factor is available. The factor loads range from 0.958 to 0.941 and the variance percentage is 90.139.

3.3. Factor & Reliability Analysis of the Scale “Union Loyalty of Union Managers”

Factor loads and Cronbach alpha factors of the scale “union loyalty of union members” are evaluated here. KMO (Kaiser-Meyer-Olkin) test to measure the internal consistency and reliability of the scale “union loyalty of union members” is 92.8%. $92.8\% > 0.50$ and therefore the data set is suit-

able for factor analysis. The second test performed is the Bartlett test. The test is meaningful based on the outcome of the analysis ($p=0.000<0.01$). The general Cronbach alpha factor is detected to be 0.866 based on the reliability analysis. This result confirms that the scale has a high level of reliability.

Analyses with a factor load lower than 0.50 and listed under a multiple factors are not included in the analysis. The factor analysis for this scale was repeated with statements 3, 5, 6, 9, 11, 13, 14, 15, 22, 23, 24, 25 and 27 excluded based on this rule. The factor analysis without these statements highlighted two factors. The first factor is the trust in unionism, willingness to work for the union and responsibility against the union. The factor loads for this factor range from 0.842 to 0.772 and the variance percentage is 44.409. Cronbach alpha factor of 0.943 confirms a high level of reliability for this sub element. The second factor is loyalty to the union. The factor loads for this factor range from 0.833 to 0.744 and the variance percentage is 22.702. Cronbach alpha factor of 0.857 confirms a high level of reliability for this sub element. All factors account for 67.1% (67.111) of the total variance.

The research data will be processed in IBM SPSS V21.0 (Statistical Package for Social Sciences) software. Data will be analyzed in two layers, namely deductive statistics and descriptive analysis. Data will be processed using classification and grouping methods as well as frequency, percentage, average (arithmetic mean, mode, median), standard deviation and other measures. Measures used include skewness and kurtosis to test normality, factor analysis to test the validity of scales, reliability analysis to determine reliability, independent group T test and one-way variance (ANOVA) tests to test the variance of average variable and sub element scores based on demographic data, and regression analysis to determine the role of leadership and organizational approach on data sharing.

4. Findings

4.1. Demographics of Union Members & Distribution of Data on Unions

Union members are broken down by gender, marital status, age, period of professional service, period of employment at the current place of employment, period of union membership, and order of importance of the reasons regarding the labor unions to effectively protect the rights and benefits of workers based on frequency and percentage.

Table 1. Frequency and Percentage Distribution

		Frequency (n)	Percent (%)
Gender	Female	22	4.7
	Male	451	95.3
	Total	473	100.0
Marital Status	Single	53	11.2
	Married	420	88.8
	Total	473	100.0
Education	Primary School	12	2.5
	Secondary School	28	5.9
	High School	55	11.6
	Vocational High School	218	46.1
	Associate Degree	103	21.8
	University	53	11.2
	Postgraduate	4	0.8
	Total	473	100.0
Age	18-25 years	12	2.5
	26-33 years	113	23.9
	34-41 years	200	42.3
	42-49 years	134	28.3
	50 and over	14	3.0
	Total	473	100.0

Period of Professional Service	1-5 years	29	6.1
	6-10 years	93	19.7
	11-15 years	141	29.8
	15 years or more	210	44.4
	Total	473	100.0
Period of Employment at the Current Place of Employment	1-5 years	100	21.1
	6-10 years	131	27.7
	11-15 years	88	18.6
	15 years or more	154	32.6
	Total	473	100.0
Period of Membership to the Labor Union	1-5 years	188	39.7
	6-10 years	99	20.9
	11-15 years	58	12.3
	15 years or more	128	27.1
	Total	473	100.0
Extent of Protection of the Rights of Workers by Labor Unions	No	254	53.7
	No Idea	67	14.2
	Yes	152	32.1
	Total	473	100.0

95.3% of union members are men, 4.7% are women, 88.8% are married, 11.2% are single, 46.1% are vocational school graduates, 21.8% are associate degree program graduates, 11.6% are high school graduates, 11.2% are university graduates, 5.9% are secondary school graduates, 2.5% are primary school graduates, 0.8% are post-graduates, 42.3% are from 34 to 41, 28.3% are from 42 to 49, 23.9% are 26 to 33, 3.0% are 50 or older, 2.5% are from 18 to 25, 44.4% have been working for 15 years or more, 29.8% from 11 to 15 years, 19.7% from 6 to 10 years, 6.1% from 1 to 5 years, 32.6% have been employed by the same employer for 15 years or more, 27.7% from 6 to 10 years, 21.1% from 1 to 5 years, 18.6% from 11 to 15 years, 39.7% have been union members for 1 to 5 years, 20.9% for 6 to 10 years, 12.3% for 15 years or more, 32.1% think that the labor union effectively protects the rights of the workers, 53.7% disagree and 14.2% are undecided.

Table 2. Findings on Priorities Regarding Improving the Rights and Benefits of Workers

Order of Importance Regarding Improving the Rights and Benefits of Workers	1. Importance	2. Importance	3. Importance
The laws are antidemocratic	50.4	23.2	26.4
Labor unions are incapable	47.2	22.0	30.7
Union policies are inadequate	45.3	28.0	26.8
Insufficient internal democracy within unions	43.3	23.6	33.1
Not sufficient communication among labor unions	46.9	23.6	29.5
Workers are not interested in labor unions	43.7	27.6	28.7
Not enough communication with the employers	43.3	25.2	31.5

*Percentages were recalculated based on frequencies due to multiple options

%50.4 of union members rank the importance of antidemocratic laws as priority 1, 26.4% as priority 2 and 23.2% as priority 3. %47.2 of union members rank the incapability of labor unions as priority 1, 30.7% as priority 2 and 22.0% as priority 3. 45.3% of union members think that union policies, are ineffective, 43.3% think that there is not enough democracy within the union, 46.9% think that there is not sufficient communication among the labor unions, 43.7% think that workers are not sufficiently interested in labor unions and 43.3% think that there is not sufficient communication with the employees as priority 1 issue.

4.2. Average, Standard Deviation, Skewness and Kurtosis Co-efficient

Average, standard deviation, skewness and kurtosis of variables derived from the general average and of factors and measures calculated

by the factor analysis are listed in the table below. This title evaluates the impact of the role of labor unions on worker-employee relations on achievements of the labor union managers, loyalty of the managers, faith in the importance of unionism, their willingness to work for the union, responsiveness to the union as well as the hypothesis tests based on skewness and kurtosis and proximity to normal distribution which is required for regression analysis.

Table 3. Average, Standard Deviation, Skewness and Kurtosis Coefficient

			Skewness		Kurtosis	
			Statis- tics	Std. Error	Statis- tics	Std. Error
Role of Labor Unions on Worker-Employee Relations	3.17	1.147	-0.155	0.112	-1.056	0.224
Achievements of Labor Union Managers	3.03	1.273	-0.052	0.112	-1.180	0.224
Union Loyalty of Members	3.15	0.757	-1.115	0.112	1.317	0.224
Trust in Unionism, Willingness to Work for the Union and Responsibility Against the Union	3.47	1.039	-0.668	0.112	-0.167	0.224
Loyalty to the Union	2.50	0.929	0.397	0.112	-0.185	0.224

The average values are 3.171.147 for the variable “role of labor unions on worker-employee relations”, 3.031.273 for the variable “achievements of labor union managers”, 3.150.757 for the variable “loyalty of union managers to the union”, 3.471.039 for the variable “faith in the importance of unionism, willingness to work for the union and responsiveness to the union”, and 2.500.929 for the variable “loyalty to the union”. The averages show regarding the impact of the role of labor unions on worker-employee relations that union members are undecided about the achievements of union members and loyalty of the managers to the union, agree about

faith in the importance of unionism, willingness to work for the union and responsiveness to the union, and are undecided about the loyalty of union managers to the union. Skewness and kurtosis of these variables and factors are in the range of 1.5 and therefore they are in close proximity to normal distribution. This shows that parametric tests suitable for variance testing should be used.

4.3. Simple Linear Regression Analysis

A simple linear regression analysis was used to define the impact of the independent variable on the dependent variable. This gives the impact of the role of unions on worker-employer relations on the achievements of union managers, union loyalty, faith in the importance of unionism, their willingness to work for the union and their responsiveness and loyalty to the union.

Table 4. Results of Simple Regression Analysis Used To Define the Impact of the Independent Variable on the Dependent Variable

Dependent Variable	Independent Variable	Non-standardized Factor		Standardized Factor			
Achievements of Labor Union Managers	(Fixed)	-0.107	0.078		-1.368	0.172	
	Role of Labor Unions on Worker-Employee Relations	0.990	0.023	0.891	42.631	0.000	
Corrected R ² : 0.794, F:1817.382, p:0.000, DW=2.149							
	(Fixed)	1.757	0.077		22.966	0.000	
Union Loyalty of Members	Role of Labor Unions on Worker-Employee Relations	0.439	0.023	0.665	19.333	0.000	
Corrected R ² : 0.441, F:373.746, p:0.000, DW=1.831							

Trust in Unionism, Willingness to Work for the Union and Responsibility Against the Union	(Fixed)	1.080	0.078		13.899	0.000
	Role of Labor Unions on Worker-Employee Relations	0.755	0.023	0.833	32.723	0.000
Corrected R ² : 0.694, F:1070.824, p:0.000, DW=1.988						
	(Fixed)	3.112	0.122		25.487	0.000
Loyalty to the Union	Role of Labor Unions on Worker-Employee Relations	-0.192	0.036	-0.237	-5.294	0.000
Corrected R ² : 0.054, F:28.022, p:0.000, DW=1.770						

The role of labor unions on worker-employee relations explains 79.4% of the achievements of union managers. The model which shows the impact of the independent variable on the dependent variable is meaningful based on the results of the ANOVA test ($p=0.0000.01$). The table above shows that the fixed value is not meaningful ($p=0.1720.05$) but the independent variable is meaningful ($p=0.0000.01$). DW statistics of the model is between 1.5 and 2.5 and therefore there is no auto-correlation. The non-standardized and standardized regression loads for the variable of the role of labor unions on worker-employee relations are 0.990 and 0.891 respectively. The role of labor unions on worker-employee relations increases the achievements of union managers by 0.891 base points. The role of labor unions on worker-employee relations has an impact on the achievements of union managers. Simple linear regression model: Achievements of Labor Union Managers= $0.891 \times \text{Role of Labor Unions on Worker-Employee Relations}$

The role of labor unions on worker-employee relations explains 44.1% of the union loyalty of union managers. The model which shows the impact of the independent variable on the dependent variable is meaningful based on the results of the ANOVA test ($p=0.0000.01$). The table above shows that the fixed value factor and the independent variable factor are meaningful ($p=0.0000.01$). DW statistics of the model is between 1.5 and 2.5 and therefore there is no auto-correlation. The regression load and standardized regression load for the variable of the role of labor unions on worker-employee relations in this model are 0.439 and 0.665 respectively. The role of labor unions on worker-employee relations increases the union loyalty of union managers by 0.665 base points. The role of labor unions on worker-employee relations has an impact on the union loyalty of union managers. Simple linear regression model: Union Loyalty of Labor Union Managers = $1.757 + 0.665 \times \text{Role of Labor Unions on Worker-Employee Relations}$

The role of unions on worker-employer relations explains 69.4% of the union managers' faith in the importance of unionism, their willingness to work for the union and their responsiveness to the union. The model which shows the impact of the independent variable on the dependent variable is meaningful based on the results of the ANOVA test ($p=0.0000.01$). The table above shows that the fixed value is not meaningful ($p=0.1720.05$) but the independent variable is meaningful ($p=0.0000.01$). DW statistics of the model is between 1.5 and 2.5 and therefore there is no auto-correlation. The regression load and standardized regression load for the variable of the role of labor unions on worker-employee relations of this model are 0.755 and 0.833 respectively. The role of unions on worker-employer relations increases the union managers' faith in the importance of unionism, their willingness to work for the union and their responsiveness to the union by 0.833 base points. The role of unions on worker-employer

relations has an impact on the union managers' faith in the importance of unionism, their willingness to work for the union and their responsiveness to the union. Simple linear regression model: Union Managers' Faith in the Importance of Unionism, Willingness to Work for and Responsiveness to the Union= $1.080 + 0.833 \cdot \text{Role of Labor Unions on Worker-Employee Relations}$

The role of labor unions on worker-employee relations explains 5.4% of the union loyalty of union managers. The model which shows the impact of the independent variable on the dependent variable is meaningful based on the results of the ANOVA test ($p=0.0000.01$). The table above shows that the fixed value is not meaningful ($p=0.1720.05$) but the independent variable is meaningful ($p=0.0000.01$). DW statistics of the model is between 1.5 and 2.5 and therefore there is no auto-correlation. The regression load and standardized regression load for the variable of the role of labor unions on worker-employee relations in this model are -0.192 and -0.237 respectively. The role of labor unions on worker-employee relations decreases the union loyalty of union managers by 0.237 base points. The role of labor unions on worker-employee relations has an impact on the union loyalty of union managers. Simple linear regression model: Union Loyalty of Labor Union Managers= $3.112 - 0.237 \cdot \text{Role of Labor Unions on Worker-Employee Relations}$

4.4. Hypothesis Results

The table below lists the hypotheses, analyses, explanatoriness, standardized factor and results.

Table 5. Hypothesis Results

Hypotheses	Analysis	Cor- rected R ²	Beta		Result
H₁: The role of labor unions on the relations between workers and employers have an impact on the achievements of managers.		0.794	0.891	0.000	Acceptance
H₂: The role of labor unions on the relations between workers and employers have an impact on loyalty of managers to the union.		0.441	0.665	0.000	Acceptance
H _{2a} : The role of labor unions on the relations between workers and employers have an impact on loyalty to the labor union.	Simple Regres- sion	0.054	-0.237	0.000	Acceptance
H _{2b} : The role of labor unions on the relations between workers and employers have an impact on the responsibilities of managers against the labor union.					
H _{2c} : The role of labor unions on the relations between workers and employers have an impact on the managers' faith in unionism.		0.694	0.833	0.000	Acceptance
H _{2d} : The role of labor unions on the relations between workers and employers have an impact on the willingness of managers to work for the labor union.					

5. Result

Companies can achieve their objectives only if the workers have good communication and relations with the employees. The working class expands with the increasing population. This also increases the number of employees, which may result in lack of efficient communication within

the company and deterioration of relations between the workers and employers. This is why labor unions are important. Labor unions maintain the communication and relations between workers and employees to help workers earn their requests and maintain a stable employment at a company. They can also have an impact on achievements, loyalty to the union, importance of unionism, responsiveness and willingness to work for the union. Labor unions also represent workers before employees and give them a chance to have an impact on or change their decisions. The efforts of labor unions to help the workers reach their objectives in accordance with the applicable laws and regulations are beneficial both for workers and employees. It is also beneficial for labor unions.

Union members who have no idea regarding the extent of protection of the rights of workers by labor unions think that the role of labor unions on worker-employee relations and the achievements of union managers is more important as compared to the members who think that unions do not effectively protect the rights of the workers. Union members who think that unions effectively protect the rights of the workers think that the role of labor unions on worker-employee relations is more important on achievements of union managers, union loyalty, faith in the importance of unionism, willingness to work for the union and responsiveness against the union as compared to the members who think that unions do not effectively protect the rights of the workers. Union members who think that unions effectively protect the rights of the workers think that the role of labor unions on worker-employee relations is more important on achievements of union managers, union loyalty, faith in the importance of unionism, willingness to work for the union and responsiveness against the union as compared to the members who have no idea regarding the extent of protection of the rights of workers by labor unions.

Union members who think that unions do not effectively protect the rights of the workers think of union managers as more loyal to the union as compared to the members who think that unions effectively protect the rights of the workers. Union members who think that unions effectively protect the rights of the workers think of union managers as more loyal to the union as compared to the members who have no idea regarding the extent of protection of the rights of workers by labor unions.

The role of unions on worker-employer relations influences the achievements of union managers, union loyalty, faith in the importance of unionism, their willingness to work for the union and their responsiveness and loyalty to the union.

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Code of Ethics

Our journal aims to collect academically valuable and original articles per each issue. Ethical principles and values are an integrated part of our journal. Five principles are the core of our Code of Ethics. They constitute a normative framework for all the scientific fields we care.

Principle A: Responsibility and Fairness

Researchers must be in the quest for the increase of knowledge and consciousness about an issue. They must not aim at harming any individual, society, institution or state. Their articles must be the outcome of a fair and balanced approach and aim at stimulating positive follow up.

Principle B: Competency

The submitted to the Editorial Board must look interesting, correctly written and valuable in terms of their direct contribution to specific literature. If they show these basic features they will be sent to the referees. We commit ourselves to analyze the manuscripts objectively, in terms of originality, accuracy, consistency, respect of the scientific methodology.

Principle C: Diversity and Non-discrimination

All the manuscripts are welcomed regardless of nationality, gender, ethnicity, religious views and political views, when notorious, of the author. Naturally the content of the submitted manuscripts must not be so biased by personal views as to compromise the scientific level of the texts.

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Our journal aims at the preservation of any individual or institution against any possible annoyance or danger. The possible rejection of a submitted manuscript will be communicated privately to the author.

Principle E: Procedural Transparency

Researchers will be kept informed in each review procedure step. They must follow the requested timing for possible editing after the positive evaluation of the referees. Our journal will inform each contributor immediately after a decision has been made.

WRITING RULES

The requested features of the papers are as follows:

The papers must be submitted in word format. Their size must not be under 40,000 characters (spaces included) and not exceed 60,000 characters (spaces included). We plan to publish at least 5 maximum 7 articles per number.

The font must be Times New Roman. The normal text must be 12 sized, the long quotations 11, the footnotes 10. The space between the lines must be 1.5. The first line of the paragraphs must start at 0.3.

The papers must include:

- The name of the author, her/his mail address, her/his professional affiliation, her/his ORCID iD number, her/his telephone number, a 7-8 lines summary and 3-4 keywords. Naturally the papers will be forwarded to the referees without the personal data.
- The papers must not include a separate final bibliography. A short survey of the literature concerning the topic can be included in the main text and/or in the first footnote and/or along the following footnotes.
- The authors should be consistent in their use of capitalization and use it for the main elements of the name of an institution: Ottoman Empire, Ministry of the Foreign Affairs, United Nations... but minister of the Foreign Affairs, the situation of the empire etc.
- The titles of quoted works must be in italics, the title of periodicals must be in high brackets. Words and phrases still felt as foreign words in English, as well as titles in other languages should be, both in main text and footnotes, in italics and followed with translation in square parentheses. Transliterations from other alphabets should be provided according to the rules of international transliteration.
- Illustrations, tables, maps and figures must be numbered consecutively in the text and captions identifying the source of any image or data should be used. The title of the figures should be below the picture; the title of the tables, above the table.

Examples:

Fabio L. Grassi, *L'Italia e la Questione Turca 1919-1923. Opinione pubblica e politica estera*, [Italy and the Turkish Question 1919-1923. Public opinion and foreign policy], Torino Zamorani, 1996, pp. 50-52.

Giuseppe Motta, *Giustizia, Affari Interni e Immigrazione in Bulgaria nel Processo di Integrazione*, [Justice, internal affairs and immigration in Bulgaria during the integration process], in Fabio L. Grassi / Roberto Sciarrone (eds.), *I Bulgari e la Bulgaria in Europa* [The Bulgars and Bulgaria in Europe], Roma, Aracne, 2014, p. 140.

Fabio L. Grassi, *La Turchia nella Politica Francese e Italiana tra le due Guerre* [Turkey in the French and Italian policy between the two World Wars], in "Transylvanian Review", vol. XV, N. 1, Spring 2006, p. 134.

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